Workforce Planning

Implementation guide for
non-government organisations

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Implementation guide — Workforce Planner Tool

Human Resource and Training Assist system involves a number of computer programs being developed by the Open Learning Institute (OLI) for the Department of Communities' Strengthening NGOs Strategy.

Among these computer programs is the Workforce Planner tool. The first of three tools identified to support NGOs' human resource management functions, it is based on Disability Services Queensland's Workforce Planning Guide and has been modified to suit NGOs' needs.

1.1 Purpose

This document supports the implementation of the Human Resource and Training Assist system, specifically the Workforce Planner tool.

To use the Workforce Planner, it is necessary to set up a number of components. (This is usually a once-off process unless organisational information changes.)

This guide helps set up the various components and helps educate administrators about processes involved.

With any database-driven system, some administration and maintenance is required. The next sections cover super administration functions and administration functions to be performed by a nominated individual in your organisation.

In addition, guidance is provided to ensure the best implementation methods are used in the initial set-up phases.

1.1.1 Super administration functions

These activities can only be completed by a Department of Communities–assigned super administrator:

- create your organisation on the system, and
- create an administrator of your system.

1.1.2 Administration functions

Once the super administrator has created your organisation on the system and established at least one user with administrative access, you can develop the remaining configuration to support system use.

1.1.3 Implementation issues and guidance

The following process guides you through the configuration of Human Resource and Training Assist, specifically Workforce Planner tool use. Appendix 1 of this document is a configuration workbook which may be used to document your organisations' particulars, identify system users and additional information required to get started.

Things to do and consider before starting:

1. Identify your organisation's system administrator. It is possible to have more than one administrator, and it is advisable to have a back-up user with administration access.

2. Work through Appendix 1: Configuration Workbook to identify the data and descriptions initially required using the Workforce Planning tool.

3. So system data integrity is always maintained and operational, establish a <DEFAULT> region, location and team when creating an organisation ID. The <DEFAULT> setting means the administrator can complete their details when first logging into the system.

4. The appropriate configuration will be identified through Appendix 1: Configuration Workbook

5. Other Workforce Planner tools will be added to this implementation guide as they become available and configuration requirements are identified.

1.2 Super administration function

As Human Resource and Training Assist is a state wide tool that will provide access to individual NGOs will be able to access, data integrity is paramount and must be managed centrally. The Strengthening NGOs Strategy team is developing tools through its Online Resources Initiative and will perform centralised administration functions until the project concludes and decisions are made regarding the governance of the Online Resources website and associated tools.

1.2.1 Data security

IMPORTANT: The Department of Communities and NGOs using the Workforce Planner tool can only access Workforce Planner tool data specific to their organisation. Users' personal profiles are associated with just one organisation.

Although the super administration function creates organisations on the system and performs general maintenance, it cannot access data contained within an organisation's workforce plan. A comprehensive audit trail is also captured and may be reviewed if there is a need to investigate data access or changes.

Before you are able to create a workforce plan for your organisation, the super administrator must create the administrator user ID and a general organisational profile. The administrator can then create additional data required by the system and set up individuals designated as users, with the appropriate access levels.

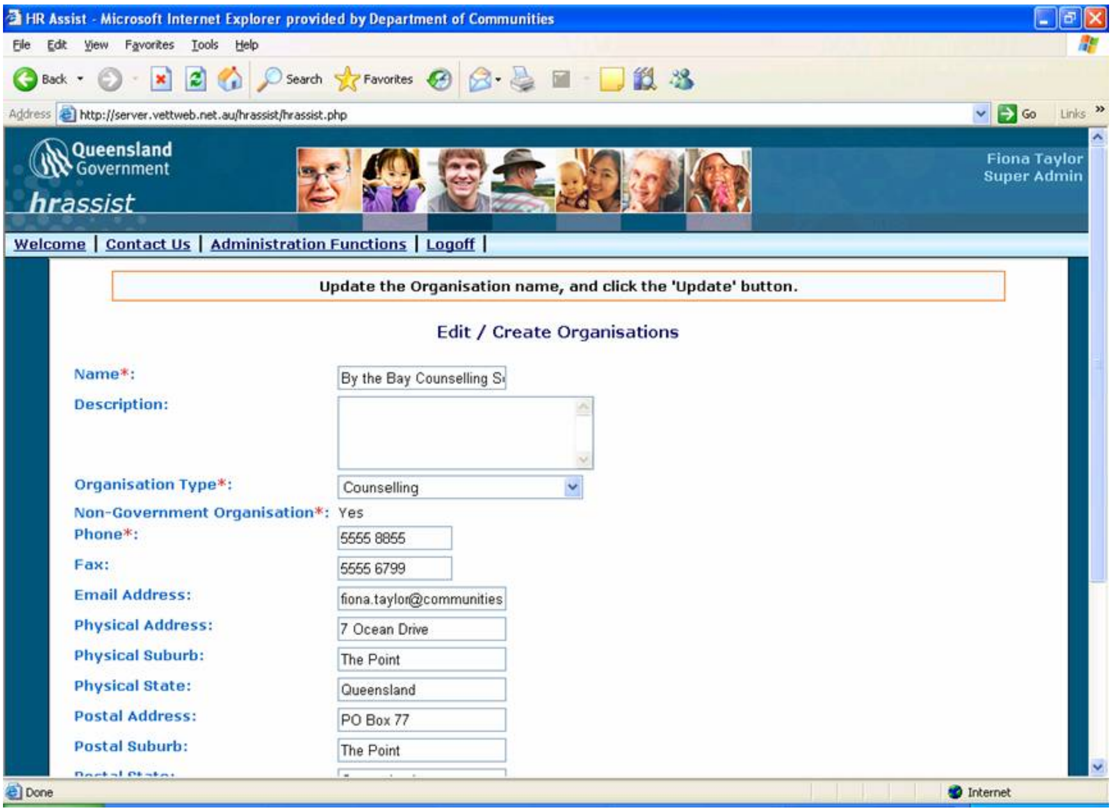
Access to Human Resource and Training Assist is via the following URL:http://server.vettweb.net.au/hrassist/hrassist.php

1.2.2 Using the 'back' button

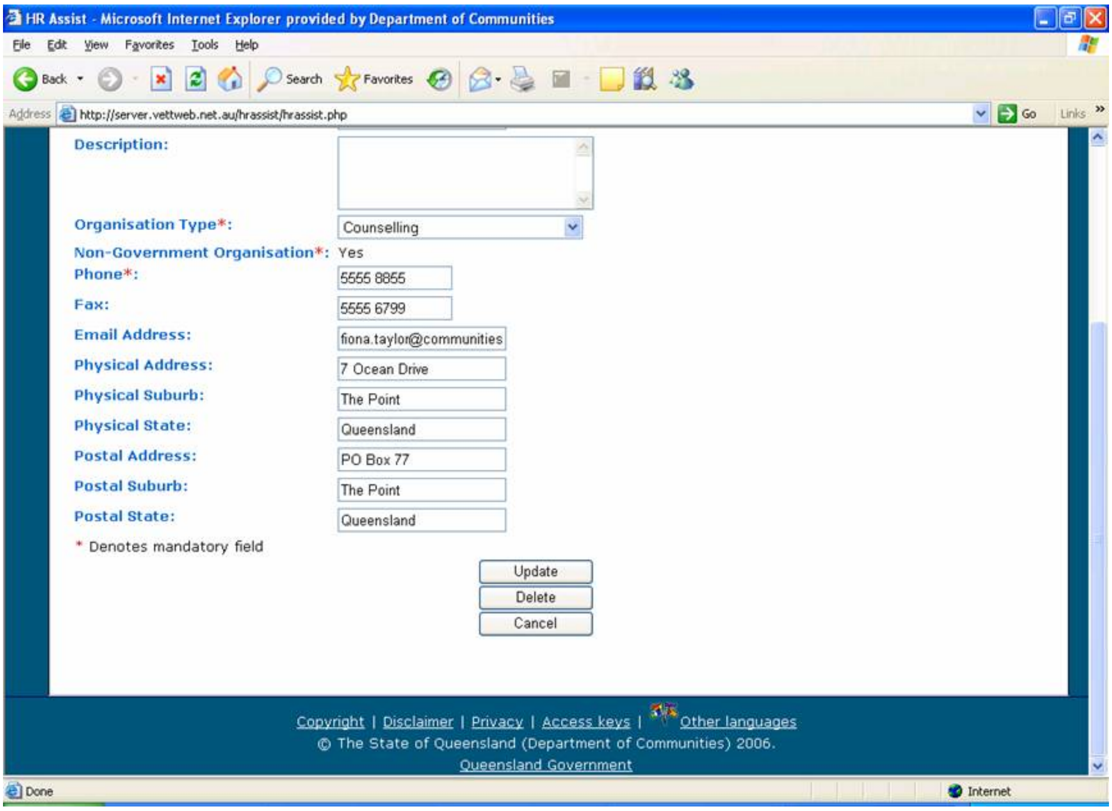
Although Human Resource and Training Assist is a web-based application, it does not support the use of the 'back' button on the Internet Explorer toolbar.

1.3 Edit/create organisations

As discussed previously, only the super administrator can create organisations on the system. The following screens detail this process and note information required.



Edit/create organisations — screen 1



Edit/create organisations — screen 2

The following table details the information required to create your organisation on the system.

Field	Description	Mandatory
Name	Your organisation's name. This will appear on reports.	Yes
Description	A description of your organisation, your mission and services you provide.	No
Organisation type	A drop-down list is provided to help categorise your organisation.	Yes
Non-Government Organisation	It is important to select this indicator if you are an NGO because it ensures access to NGO-specific content. A departmental view is also available, but is more prescriptive about reports required and deadlines.	Yes
Phone	Your contact phone number.	Yes
Fax	Your contact fax number	No
Email Address	This may be your organisation's general email address for if that is the best means of communication. In the event that an email needs to be sent to you about Human Resource and Training Assist, this will be the email address used.	Yes
Physical Address	Your street address.	No
Physical Suburb	Your suburb.	No
Physical State	Your state.	No
Postal Address	If appropriate, your postal address's street.	No
Postal Suburb	If appropriate, your postal address's suburb.	No
Postal State	If appropriate, your postal address's state.	No

1.3.1 Getting started

Before beginning to use the system, you will need to complete the following forms and fax them to 3405 6388 or send them via email to sngos@communities.qld.gov.au.

The following checklist specifies information required to start using the system:

- Ensure all mandatory fields on the forms are complete. (This is the minimum information required by the system.)
- Complete both the Organisation and User Profile forms.
- Only your organisation's administrator needs to complete the User Creation form. (NB There may be more than one administrator per organization.)

Should you have any queries, please contact:

Strengthening NGOs Strategy,
Online Resources Initiative
Phone: 07 3008 8537
Fax: 07 3405 6388
Email: sngos@communities.qld.gov.au

1.4 Forms

Organisation Creation form

Field	Your organisational details	Mandatory
Name		Yes
Description		No
Organisation type		Yes
Non-government organisation	Yes or No	Yes
Phone		Yes
Fax		No
Email address		Yes
Physical address		No
Physical suburb		No
Physical state	Queensland	No
Postal address		No
Postal suburb		No
Postal state	Queensland	No

User Creation form

User Creation and Modification form*	
Name: <Insert name here>	**Specific user details**
Security profile	
Organisation	
Region	
Location	
Team	Not Required
Occupation area	
User name	
Password	
Family name	
First name	
Middle name	
Phone	
Position title	
Manager?	<Yes or No>
Email address	
Send email notification	<Yes or No>
***All fields are mandatory.**	

1.5 Administration access

Once the Getting Started process is complete and the organisation and its administrator/s are created on the system, the rest of the configuration may progress.

To allow an organisation to manage its users, administrator/s need to be set up as follows.
Human Resource and Training Assist
→ **Workforce Planner**
→ **Administration functions**

An administrator's tasks include:

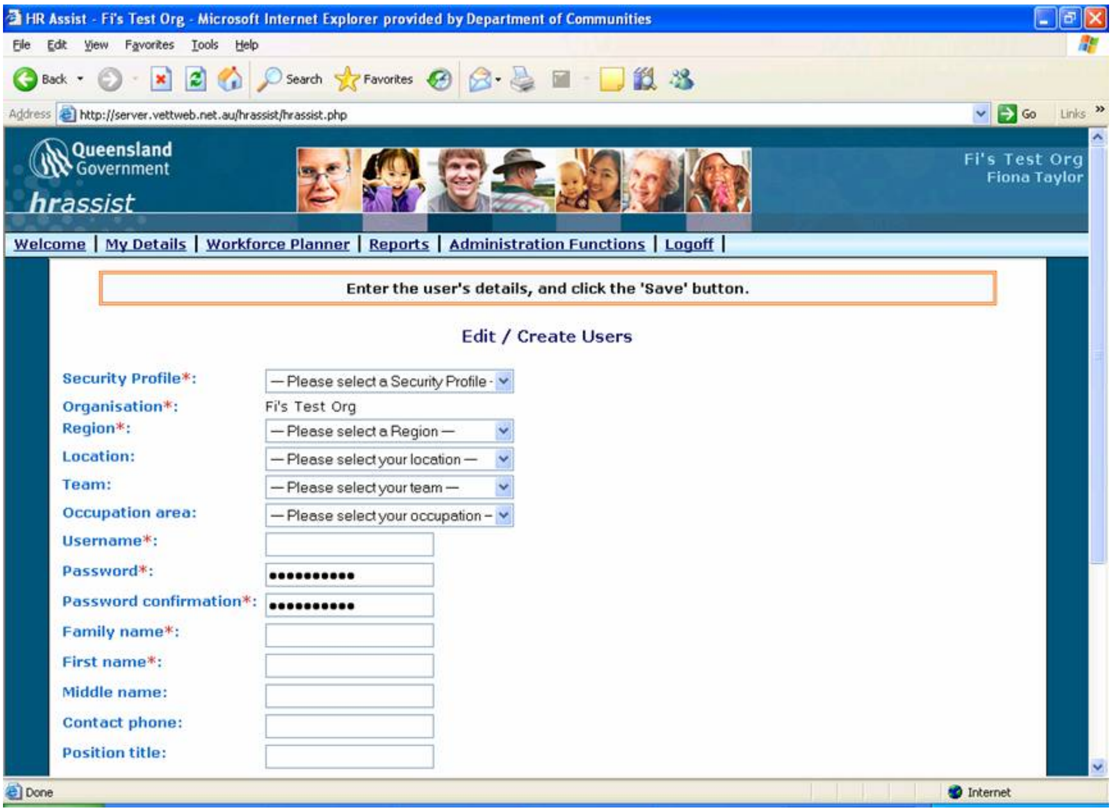
- creating regions
- creating locations
- creating users
- assigning regions to users
- assigning security to user profiles
- modifying security profiles, and
- acting as liaison point with the super administrator.

1.6 Edit/create users

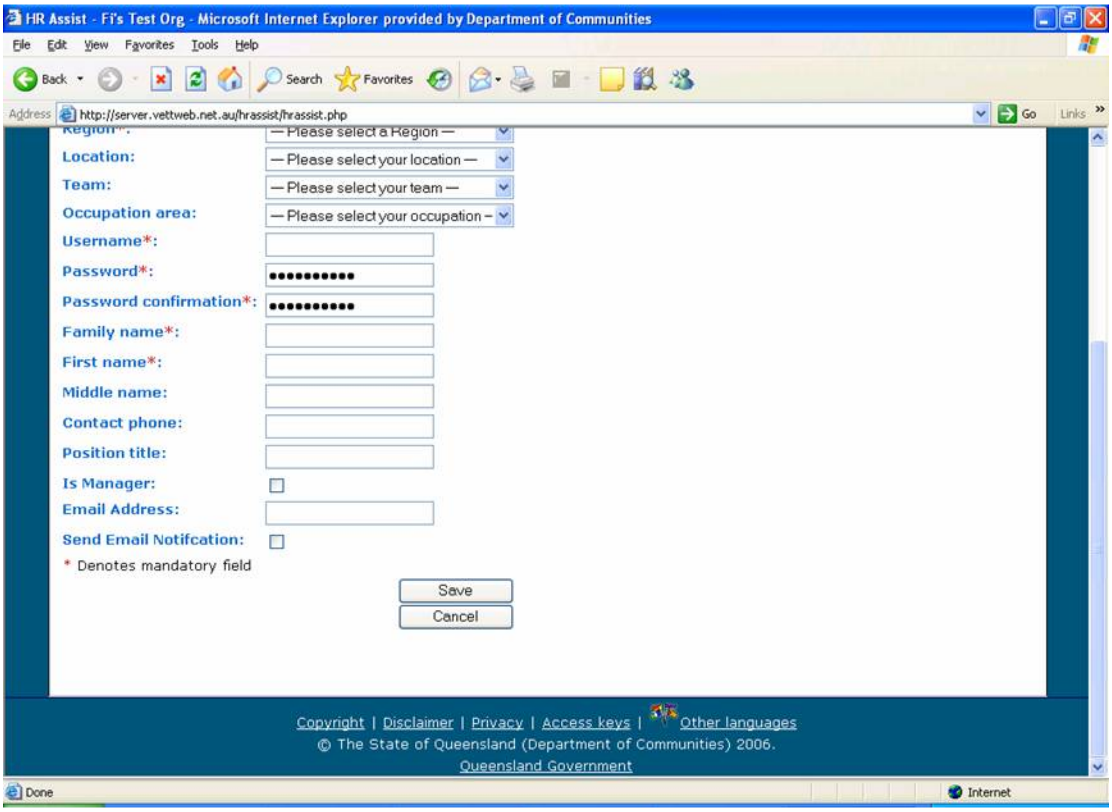
Administrators can create new system users and edit the details of existing ones. Before creating system users, it is important to review access levels available and determine their suitability for your organisation. A range of user access levels allow flexibility in the profiles you create. It is not necessary to use all of the levels as you may only require an administration access level user and a general access level user profile, for example.

The following provides you with the generic user profiles and the menus assigned to each profile.

Human Resource and Training Assist
→ **Workforce Planner**
→ **Administration functions**
→ **<Edit/create users>**



Edit/create users — screen 1



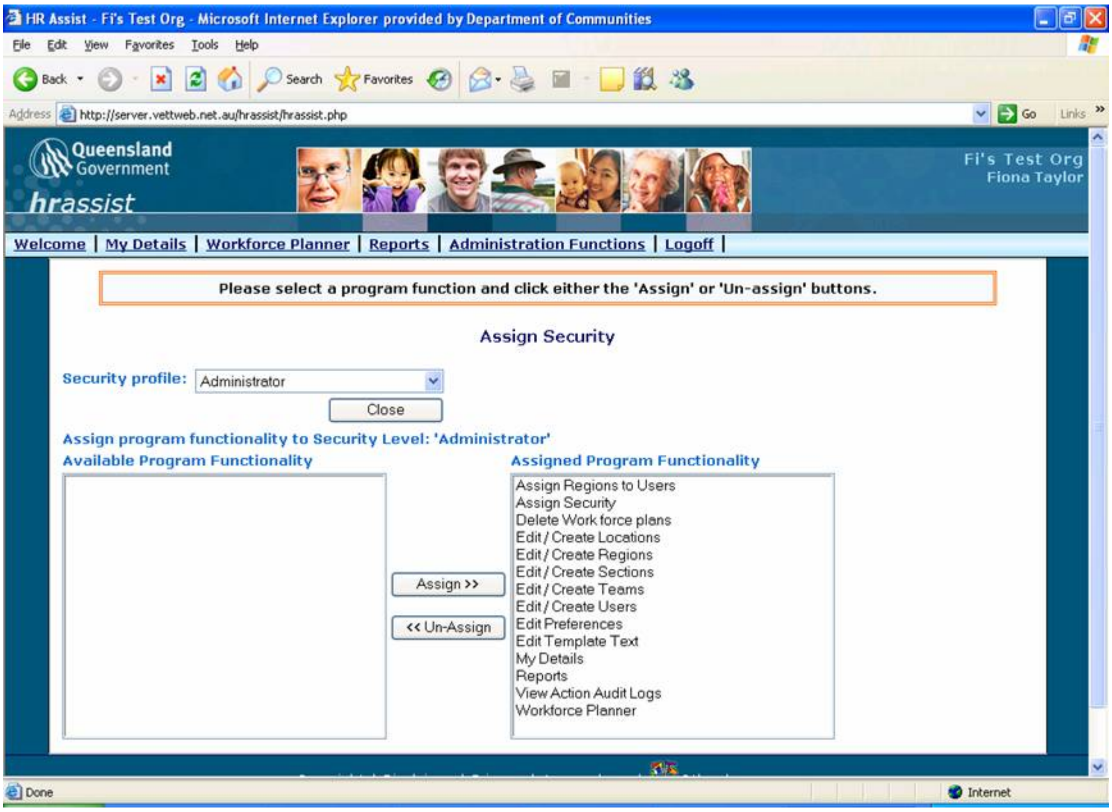
Edit/create users — screen 2

Field	Description	Mandatory
Security profile	Determines the user access level provided and the screens they can use. The list of profiles includes: • super administration access • administration access • advanced access • general access • restricted access • guest access.	Yes
Organisation	The user's organisation.	Yes
Region	The user's default or home region.	Yes
Location	The user's location.	No
Team	(Not required for Workforce Planner tool. This section will be used when implementing the Performance, Planning and Review tool.)	No
Occupation Area		
User name	The user name for Human Resource and Training Assist.	Yes
Password	The password for Human Resource and Training Assist.	Yes
Password confirmation	The password's re-entry to ensure correct entry as it is encrypted after entry.	Yes
Family name	The user's surname.	
First name	The user's given name.	
Middle name	The user's middle name.	No
Phone	The administrator's phone number.	
Position title	The administrator's title.	
Manager?	Note whether this individual is a manager. (This data will be used when implementing the Performance, Planning and Review tool.)	No
Email address	The user's email address.	Yes
Send email notification	A check box used to indicate whether an email notification is to be sent to the user on creation of their new account.	No

1.6.1 Assign security

The Assign Security feature allows the screens available to a particular user to be tailored to their organisation's needs.

Human Resource and Training Assist
→ Workforce Planner
→ Administration functions
→ <Assign security>

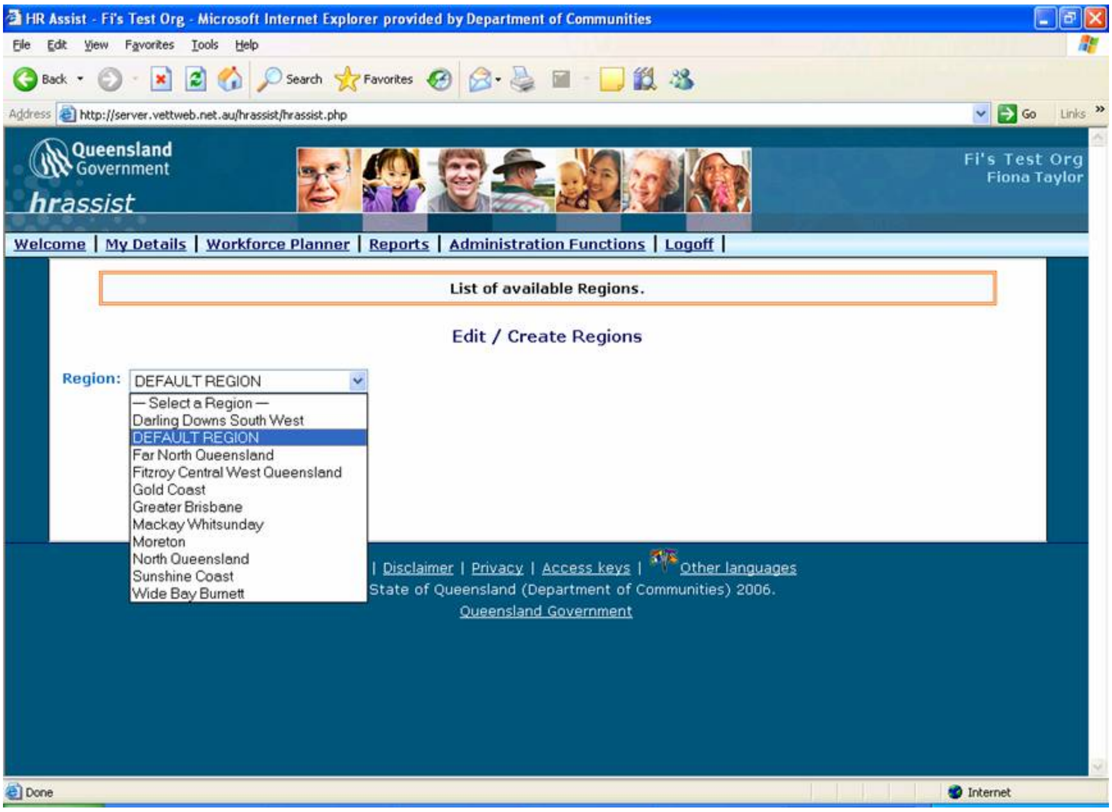


Assign security

1.7 Edit/create regions

An organisation is asked to specify its operating regions so various office sites can be identified. This information also assists with system security as only individuals who belong to the organisation and an assigned region can modify the workforce plan. An individual from the same organisation but who is based in a different region is able to view and modify the plan but cannot create or delete the plan.

Human Resource and Training Assist
    → Workforce Planner
        → Administration functions
            → <Edit/create regions>



Edit/create regions

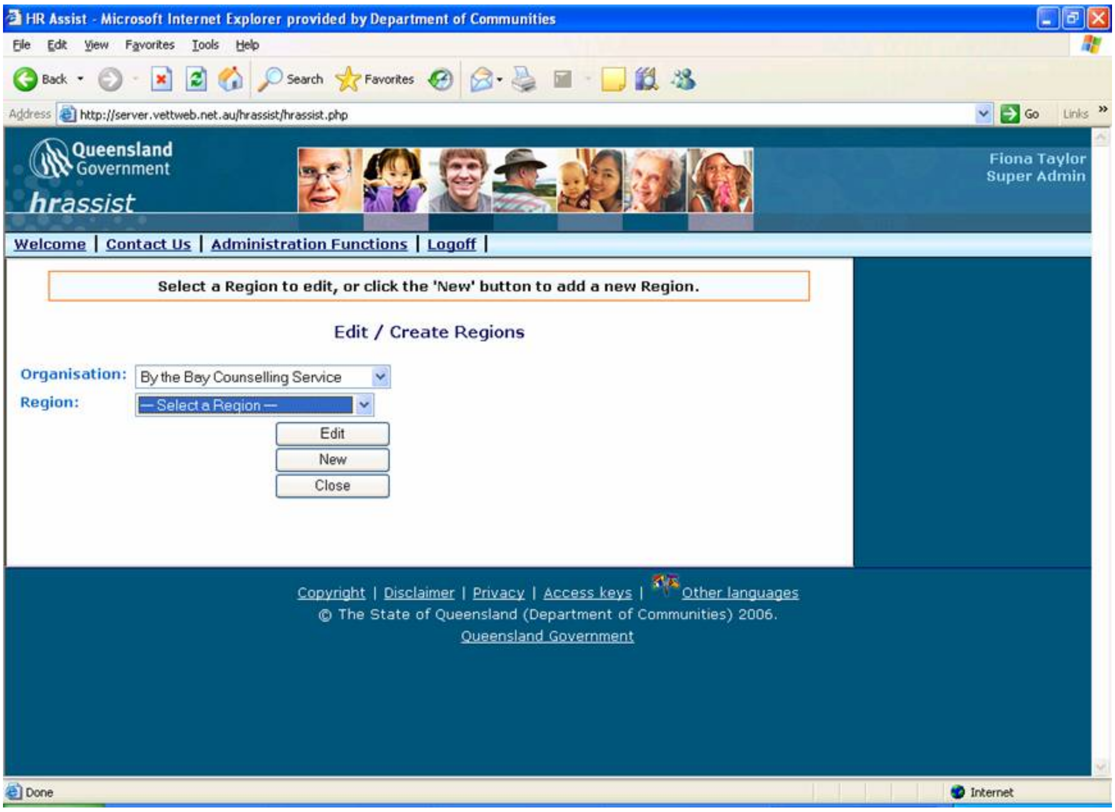
The remaining information required to use the Workforce Planner tool involves:

- regions and
- locations.

These factors are organisation-specific and should be created to align with your organisation's operations. For example, if your organisation is not divided into regions, use the 'default' region or create one consistent with your organisation's structure.

It is best to start by inputting region codes. The edit/create regions screen provides three options:

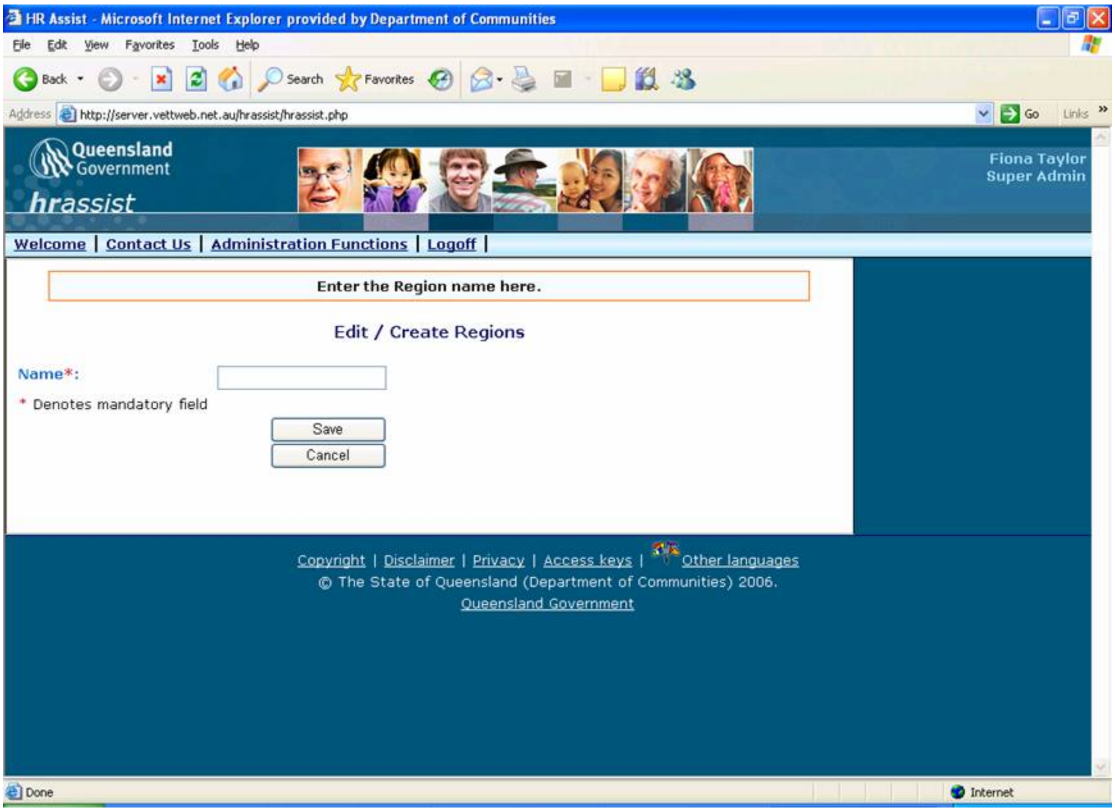
- 'edit' to modify existing region codes
- 'new' to create new region codes, or
- 'close' to exit without creating or modifying a record.



Edit/create users: create new region — screen 1

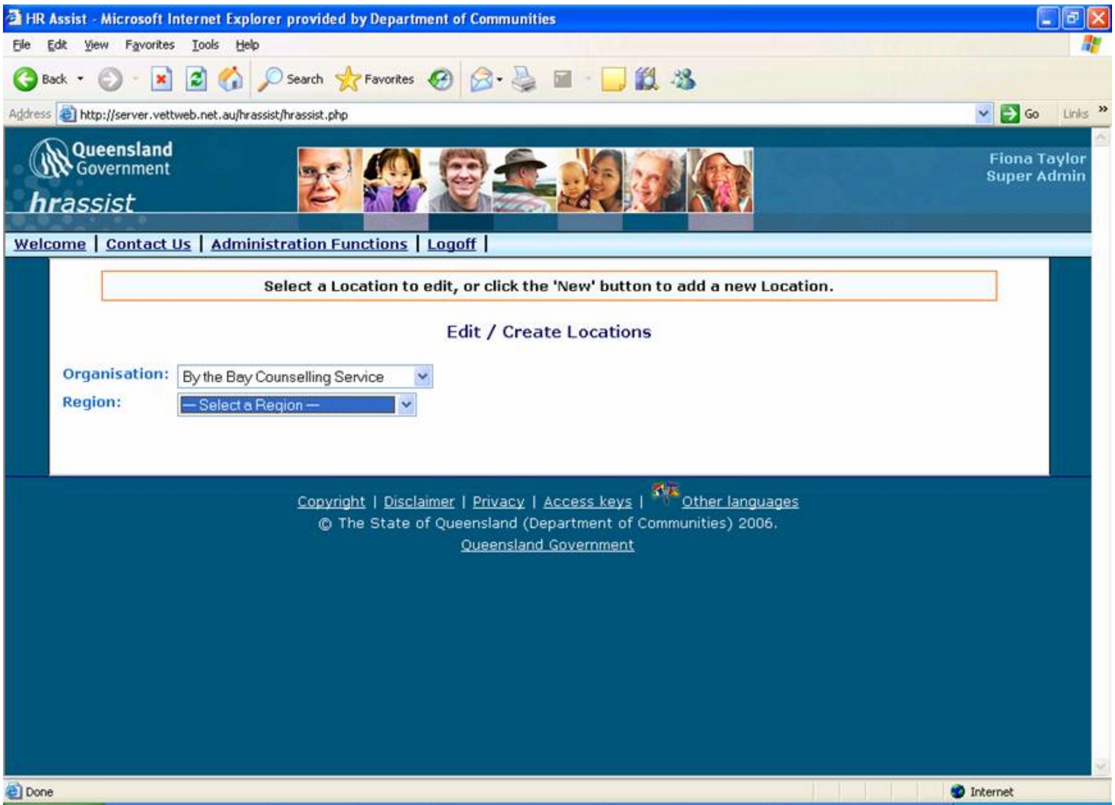
You must first select 'organisation'. Once selected, the 'new' button will generate the following screen entry. You are then required to enter the region as you intend it to be used in the system and reports. For example, 'south-east region' will appear on reports and throughout the system.

Once entered, select the 'save' button to ensure the record has been created. However, if you decide not to proceed with the code creation select the 'cancel' button.



Edit/create region: create new region — screen 2

1.8 Edit/create locations



Edit/create locations

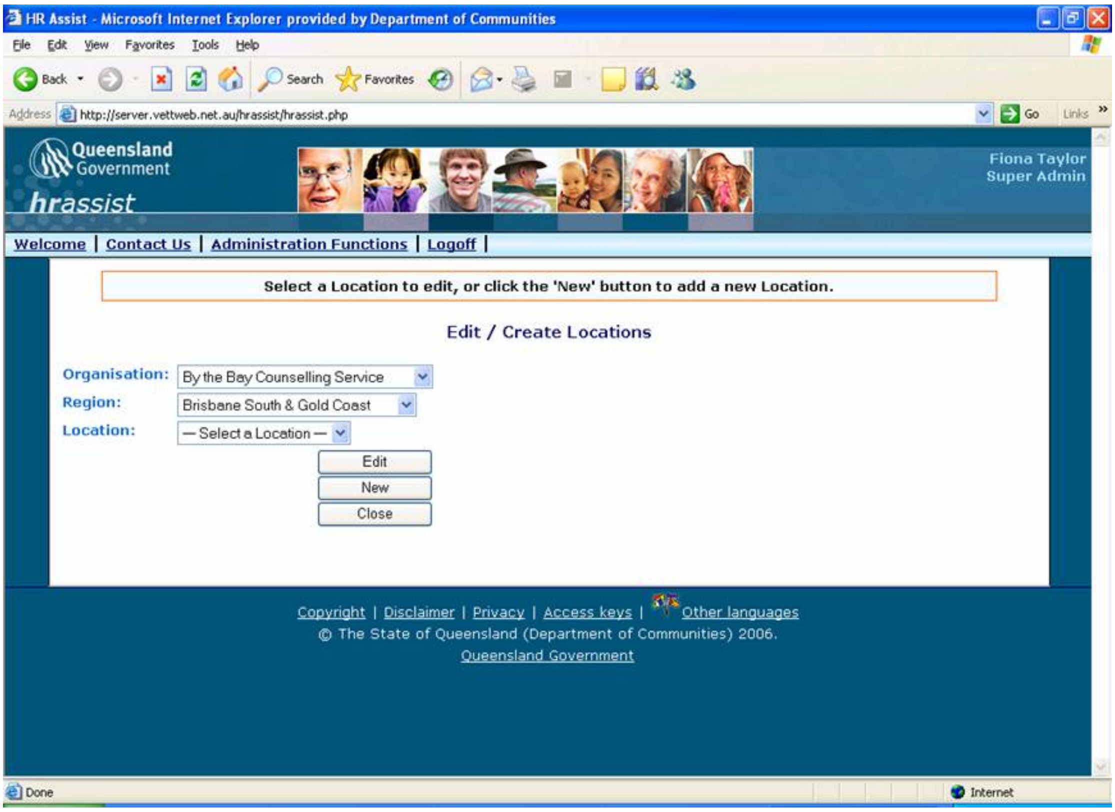
1.8.1 Create a location

To create a new location, first select the location’s region. Note that Workforce Planner data is structured hierarchically as follows:

1. organisation
2. region
3. location, and
4. team.

Remember, it is **not** necessary to create teams to successfully implement and use the Workforce Planner tool. The ‘create teams’ function will be a necessary component of other tools developed as part of Human Resource and Training Assist.

Human Resource and Training Assist
→ Workforce Planner
→ Administration functions
→ <Edit/create locations>

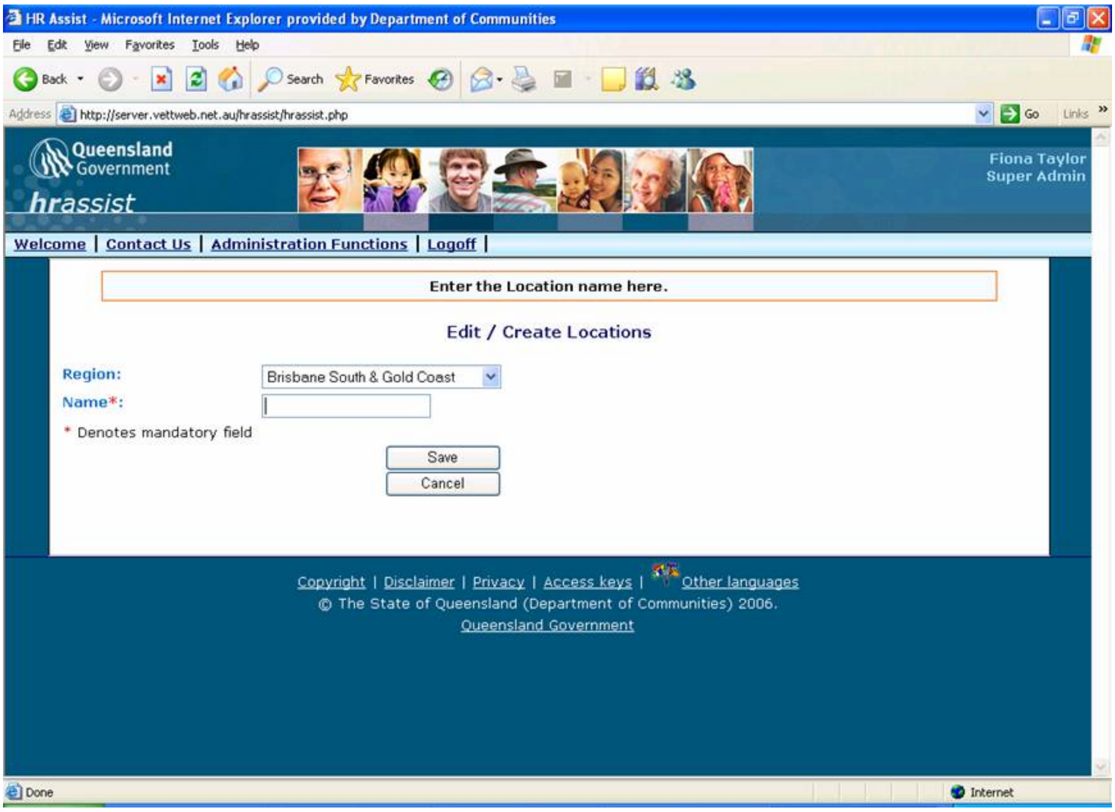


Edit/create locations — create new location

The Edit/create locations screen provides three options:

- ‘edit’ to modify existing location codes
- ‘new’ to create new location codes, and
- ‘close’ to exit without creating or modifying a record.

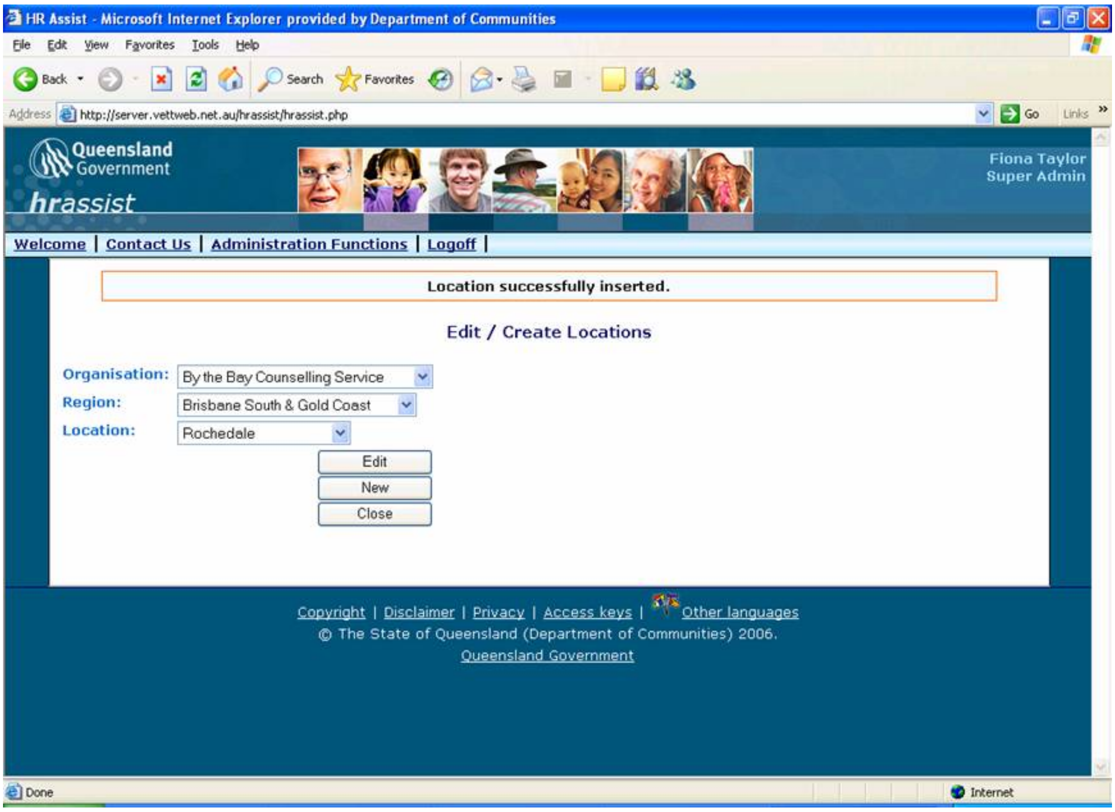
Selecting the ‘new’ button will generate the following screen:



Edit/create locations — create new location

Simply enter the location's name as you wish it to appear in the system and reports. Select the 'save' button to retain the record and add it to the locations list or 'cancel' to exit the screen without making any changes.

Saving the record will generate the following screen:



Edit/create locations — new location created

You can create as many locations as you need.

On completion, select the ‘close’ button to return to the administration functions menu.

1.9 Edit/create teams

Although included in this release of Human Resource and Training Assist, this function is not currently required to use the Workforce Planner tool. It will be required when the Performance, Planning and Review component of the Human Resource and Training Assist tool is implemented.

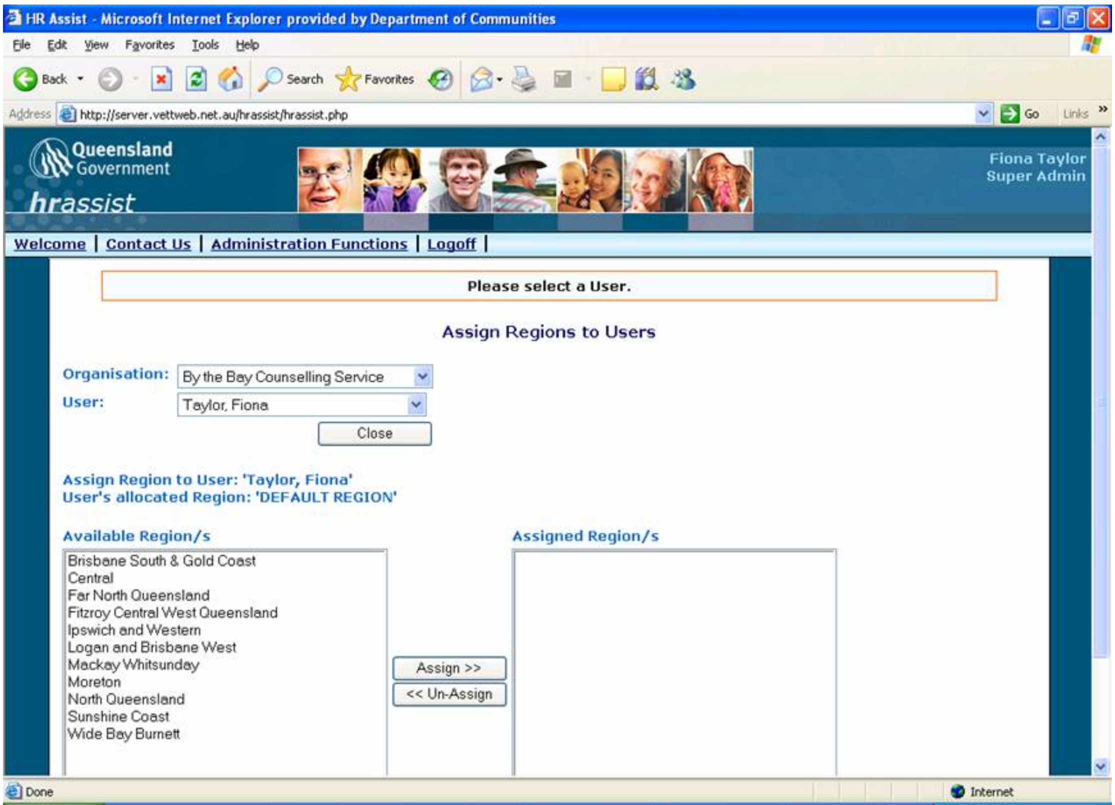
1.10 Assign regions to users

This menu option allows users to access regions within their organisation other than their ‘home’ region.

Assigning additional regions to authorised users allows them to edit these other region’s existing workforce plans.

The ability to edit plans for more than one region is a useful function for users responsible for an organisation’s workforce in multiple regions.

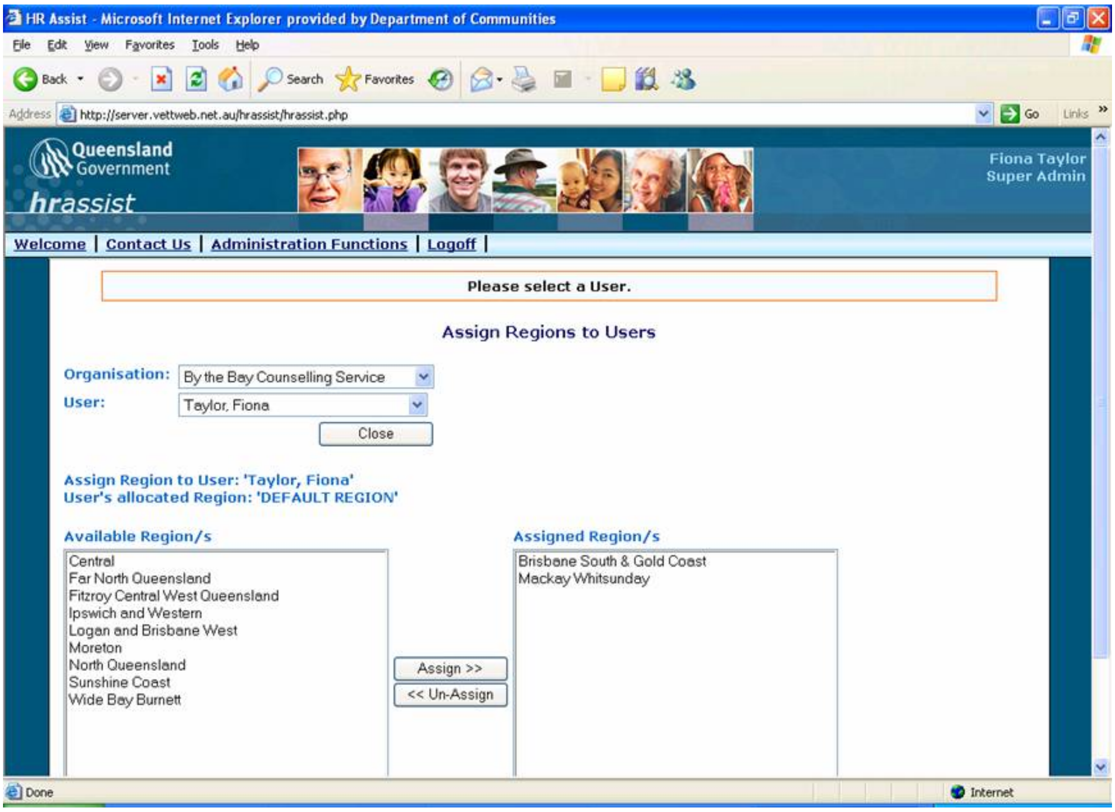
Human Resource and Training Assist
→ Workforce Planner
→ Administration functions
→ <Assign regions to users>



Assign regions to users

To select a number of regions from the left column, select the ‘assign’ button. The user’s ‘home’ region will not change but may be modified by the administrator if necessary.

The following screen demonstrates how a user is given access to two additional regions.

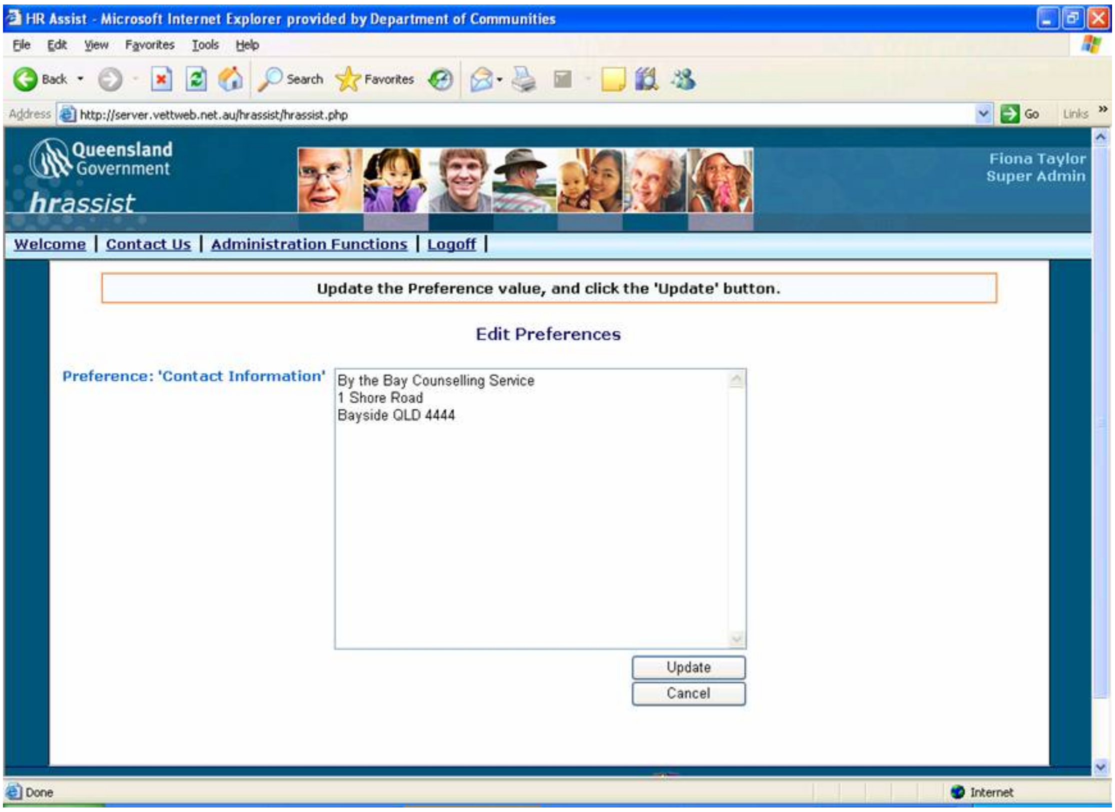


Assign regions to users — demonstrated

1.11 Site — edit preferences

This menu option creates contact information for the Human Resource and Training Assist suite of applications.

Human Resource and Training Assist
→ **Workforce Planner**
→ **Administration functions (site sub menu)**
→ **<Edit preferences>**



Edit preferences

Each of the edit preferences components operates in the same way and providing the relevant information builds a complete contact profile for the organisation.

The additional components include:

- contact person
- contact phone, and
- contact email.

As displayed above, the contact information section provides enough space to enter the organisation's physical and postal address if required.

Ultimately, the contact information appears in the Contact Us section (a link to which appears on the menu bar).

Go to Appendix 1
Configuration Workbook
on page xx

The Configuration Workbook details the next steps required to configure the system to a specific organisation's needs.

However, a number of administration functions need to be described to create a comprehensive understanding of the system, though they are not essential to system establishment.

1.11.1 Action audit logs

Action audit logs generate an overview of Workforce Planner tool activities. Administrators can view a range of data which may help diagnose system use issues.

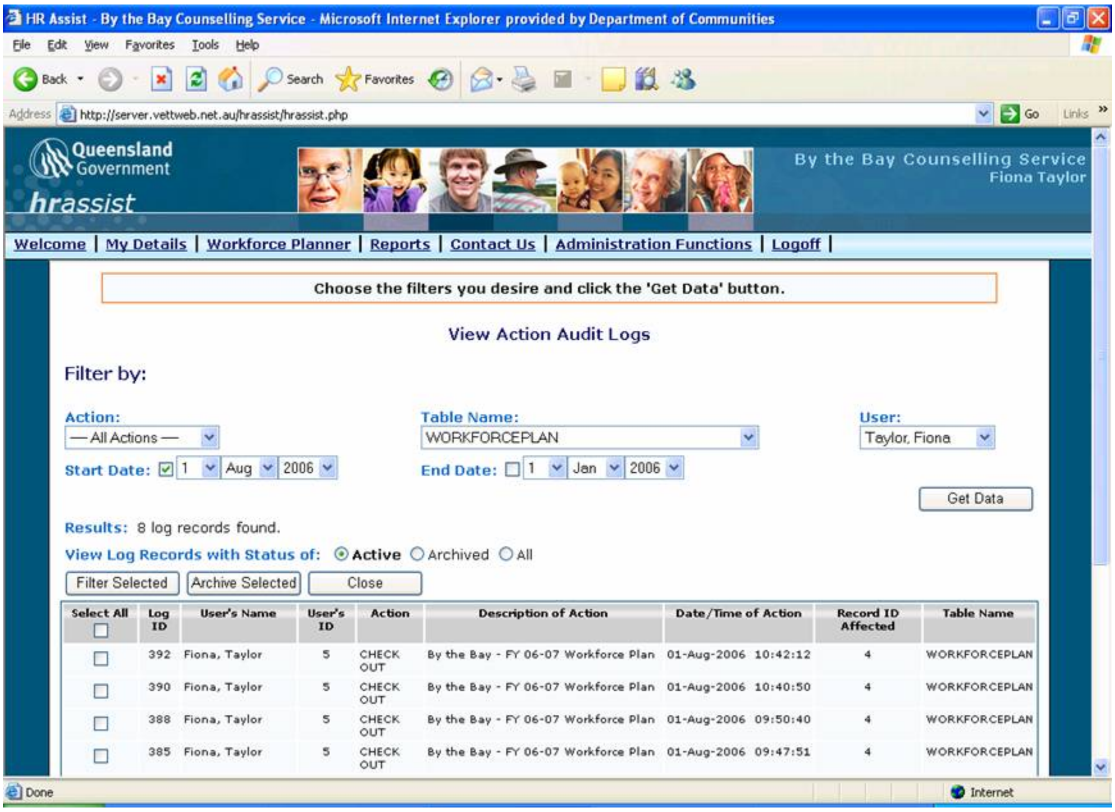
Human Resource and Training Assist
→ Workforce Planner
→ Administration functions
→ <View action audit logs>

Human Resource and Training Assist allows administrators to view system activities including:

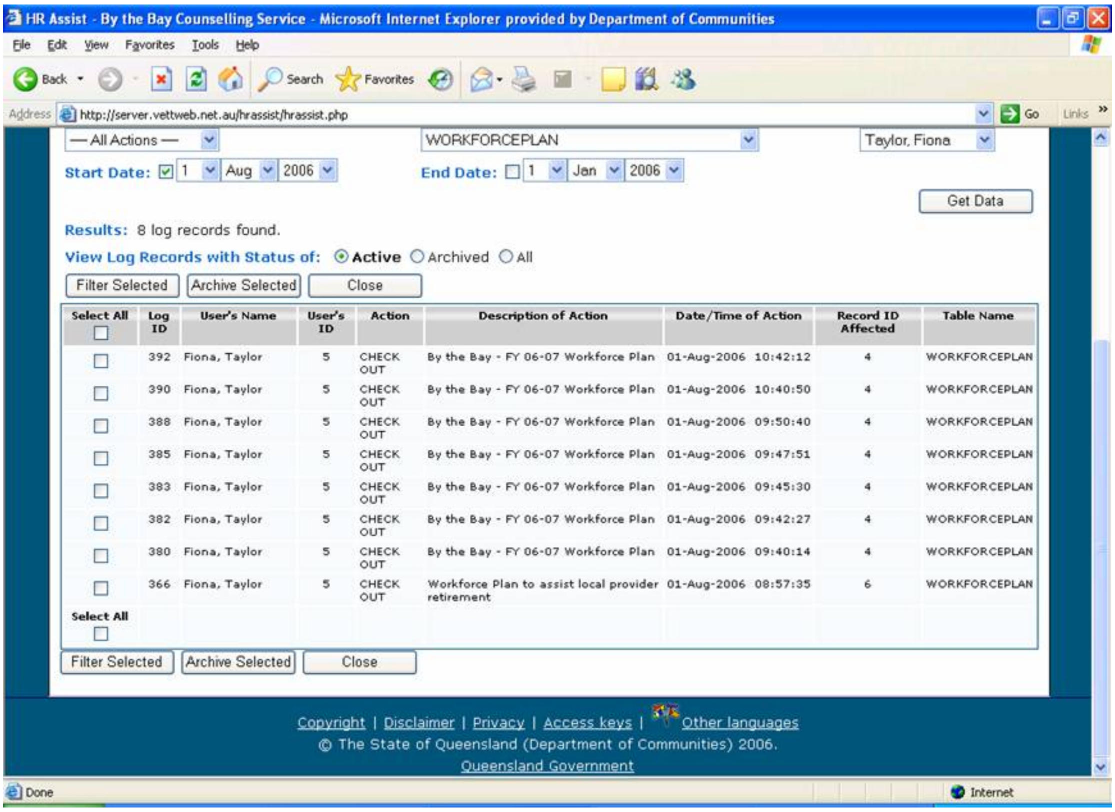
- updates
- inserts
- update/insert
- deletions
- check in/check out
- log on/log off
- email, and
- assign/un-assign.

It is also possible to filter information by a variety of data elements, as per the screen below. Filters can be selected from the predetermined list under 'Table Name'. It is also possible to filter information according to an individual user or all users.

Once selection criteria have been entered, press the 'get data' button to generate a screen similar to the one below.



View action audit logs — screen 1



View action audit logs — screen 2

1.11.2 Override check out

To ensure just one user is updating a document at a time, it is essential that the system registers that the document is 'checked out' or in use.

However, it will occasionally be necessary to override a workforce plan's 'check out' or 'in use' function.

Once a user has completed their work they are required to 'check in' or lodge the plan. Otherwise the plan becomes 'locked' and other users will be unable to access the plan.

However, if this situation occurs, the administrator has the ability to access the plan on the original user's behalf.

Human Resource and Training Assist
→ Workforce Planner
→ Administration functions
→ <Override check out>

To override a plan's 'check out' the administrator selects the 'override check out' button and the selected workforce plan will be 'checked in' and available to other system users.

Appendix 1

1.12 Configuration Workbook

The Configuration Workbook is designed to simplify the process of creating the information required by Human Resource and Training Assist. It explains each component, with Appendix 1 presenting templates to guide users on how to create organisation codes.

The document identifies the minimum data required to start using Human Resource and Training Assist — Workforce Planner Tool. Save or print these pages record relevant information for your organisation. Once these particular components are complete, you may start using the Workforce Planner.

The *Workforce Planner User Guide* provides a guide to the various screens within the Workforce Planner tool and details on how to develop and modify workforce plans for your organisation.

1.12.1 Regions

Identify the regions your organisation uses in terms of reporting and locality information. If you do not divide organisational information by region, you must create at least one region for your organisation.

The Department of Communities uses the following regional breakdown. However, you may develop your own regions for use throughout the system.

Example:

- Far North Queensland
- North Queensland
- Mackay Whitsunday
- Central Queensland
- Wide Bay Burnett
- Moreton
- Brisbane South and Gold Coast
- Logan and Brisbane West

Use this table to list the regions you need to create for your organisation:

Regions

1.12.2 Locations

List locations applicable to your organisation. These will include all locations that individuals within your organisation may be employed, where you have offices, or where you conduct your work.

Use this table to make a list of the locations you need to create for your organisation.

Locations

1.12.3 Users

The following information is required for each Human Resource and Training Assist user. Use this table as a template to generate a profile for each user you need to create or modify.

Security profile	Select from: • administration access • advanced access • general access • restricted access • guest access.
Organisation	Select from the drop-down list.
Region	Select from the drop–down list. The regions specified will be those identified and created as being applicable to your organisation.
Location	Select from the drop-down list. The locations specified will be those identified and created as being applicable to your organisation.
Team	Not required for the implementation of the Workforce Planner tool.
Occupation area	Select from the list provided for your organisation.
User name	The user name that will be assigned to the user for Human Resource and Training Assist access.
Password	The password that will be assigned to the user for Human Resource and Training Assist access.
Password Confirmation	The re-entry of the password to ensure it has been entered correctly as it is encrypted after entry.
Family name	The user's surname.
First name	The user's given name.
Middle name	The user's middle name.
Phone	The phone number to contact the administrator.
Position title	The administrator's title.
Manager?	A question regarding whether this individual is a manager in your organisation. This will be used in the Performance Planning and Review processes, once implemented.
Email address	The user's email address.
Send email notification	A check box used to indicate whether an email notification is to be sent to the user once their new account has been created.

Use the following table as a template to compile information for each of your organisation's system users.

User creation and modification form	
Name: [insert name here]	**Specific user details**
Security profile	
Organisation	
Region	
Location	
Team	<Not Required>
Occupation Area	
Username	
Password	
Family Name	
First Name	
Middle Name	
Contact Phone	
Position Title	
Manager?	<Yes or No>
Email Address	
Send email notification	<Yes or No>