This work instruction was last updated: 31st March 2010

HR Visitor Process

This Work Instruction describes the HR Visitor Process.

Section 1 Explains how to check and search for Visitors who may already be on the system (Past visitors).

Section 2 – 9 Explains how to enter a **New Visitor** (a visitor who is not already on the system).

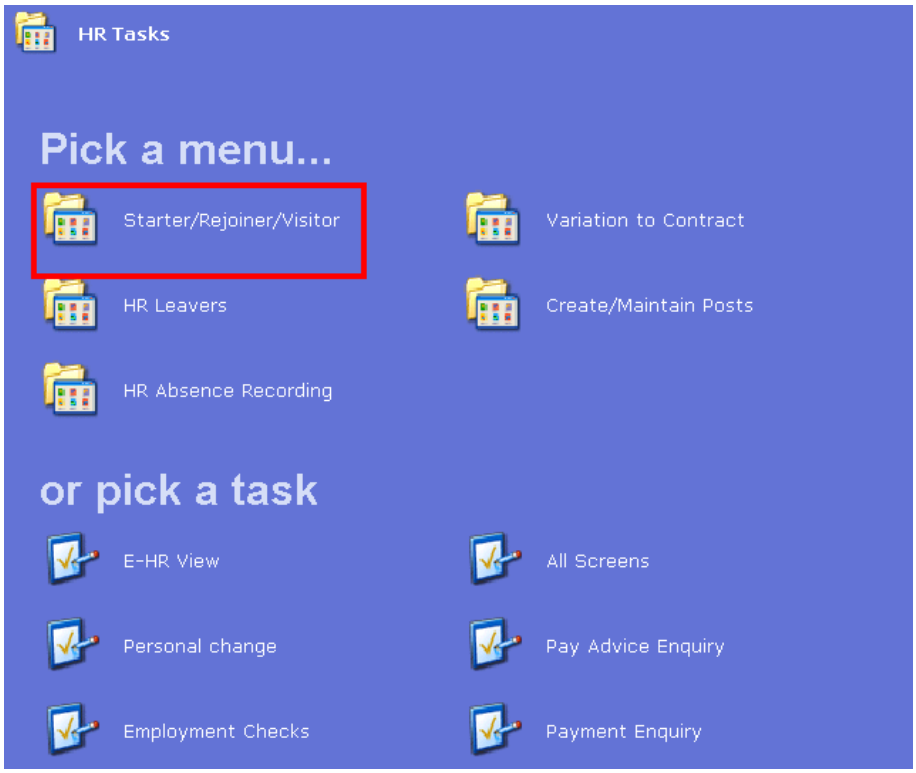
Section 10 -17 Explains how to enter **Returning Visitors** (a visitor who has left the University, and is now returning).

ⓘ Please follow the correct sections dependant on if your visitor is a **New Visitor** or a **Returning Visitor**.

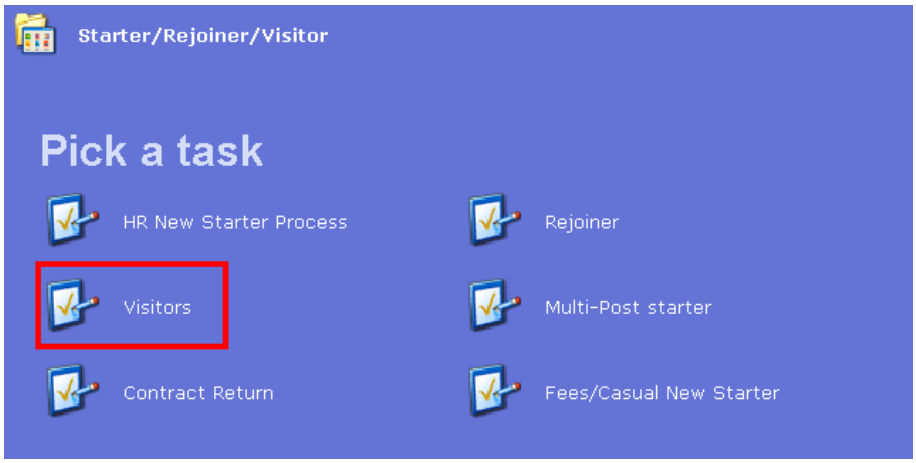
1	Setting Up a New Visitor
2	Personal Details data entry screen
3	Relationship data entry screen
4	Employment Detail data entry screen
5	Post Holding History data entry screen
6	Current Post Holding data entry screen
7	Basic Pay Details data entry screen
8	Standard letters
9	Returning Visitors
10	Personal Details data entry screen
11	Relationship Summary data entry screen
12	Employment Detail data entry screen
13	Post Holding History data entry screen
14	Current Post Holding data entry screen
15	Basic Pay Details data entry screen
16	Standard letters

1 Setting Up a New Visitor

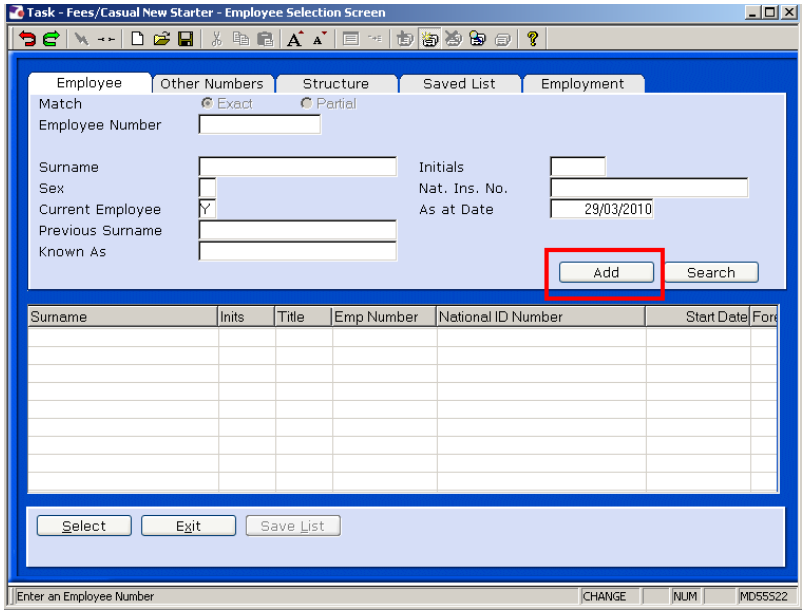
1.1 ResourceLink HR Home Page - HR Tasks – Starter/ Rejoiner/Visitor



1.2 Select Visitors

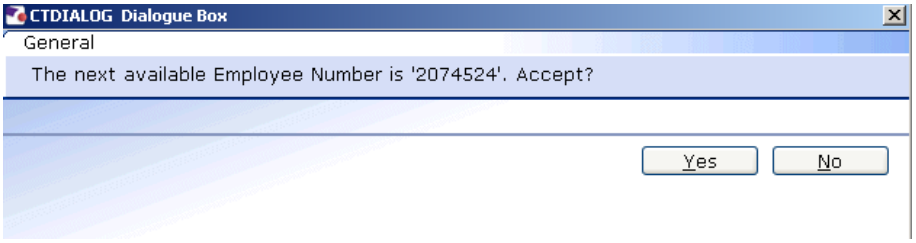


1.3 The Employee Selection Screen will be displayed.

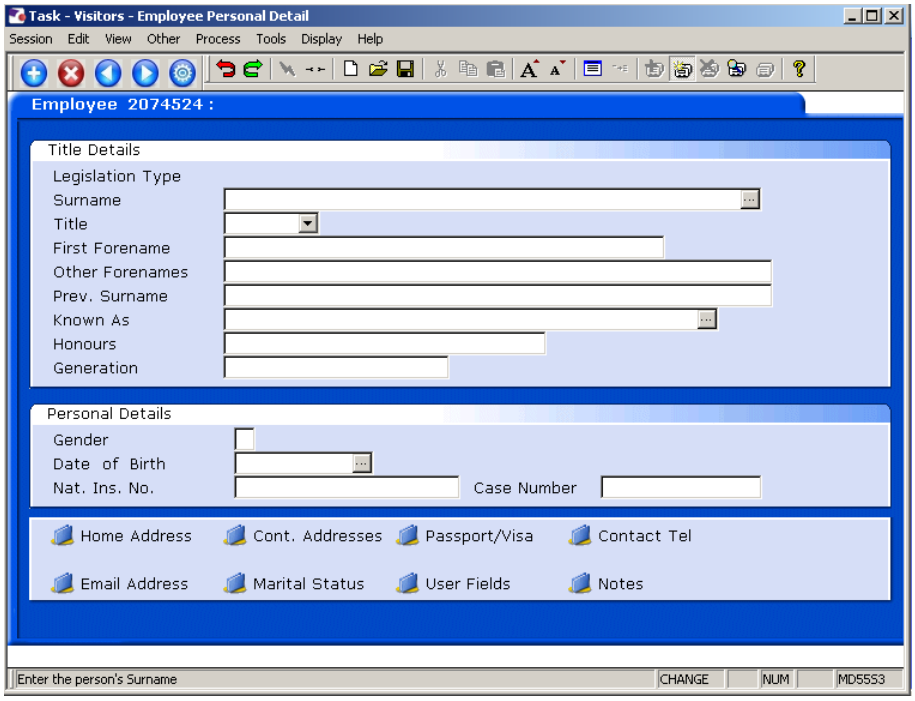


1.4 To add a new starters select ADD

1.5 The new staff number is generated Select Yes



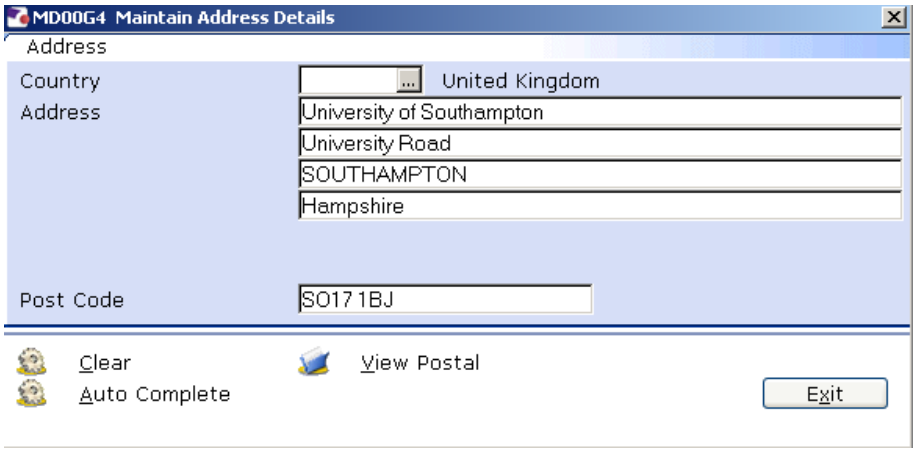
2 Personal Details data entry screen



2.1 Enter all known details in the relevant fields. If you do not know the National Insurance Number a temporary one will be generated by ResourceLink.

💣 Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

2.2 Click on **Home Address** to enter the address details.

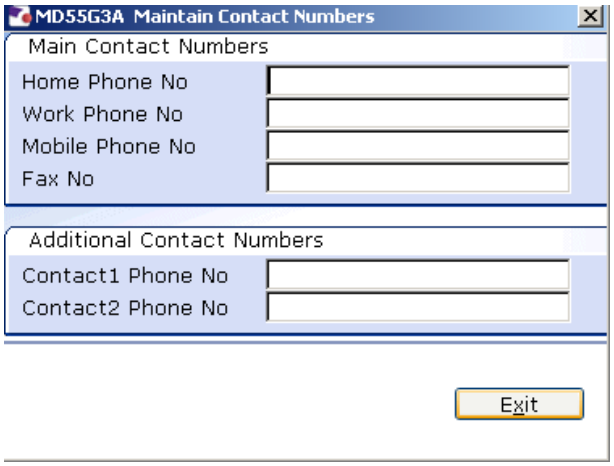


Enter the address.

ⓘ Click on **View Postal** to see how the address will be displayed on printed documentation.

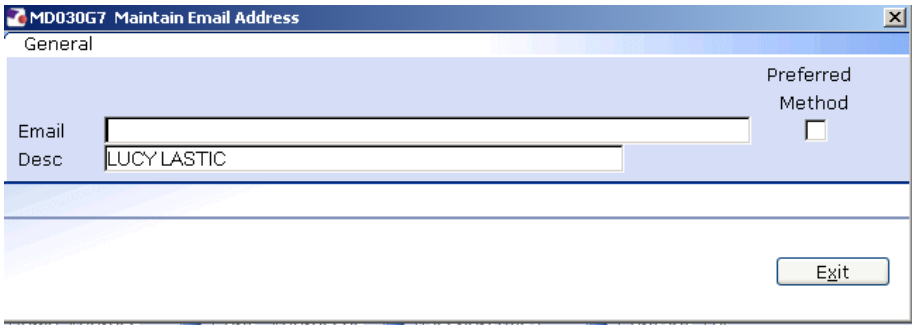
Click **Exit**.

2.3 Click on **Contact Tel** to enter the contact telephone details (if you know them).



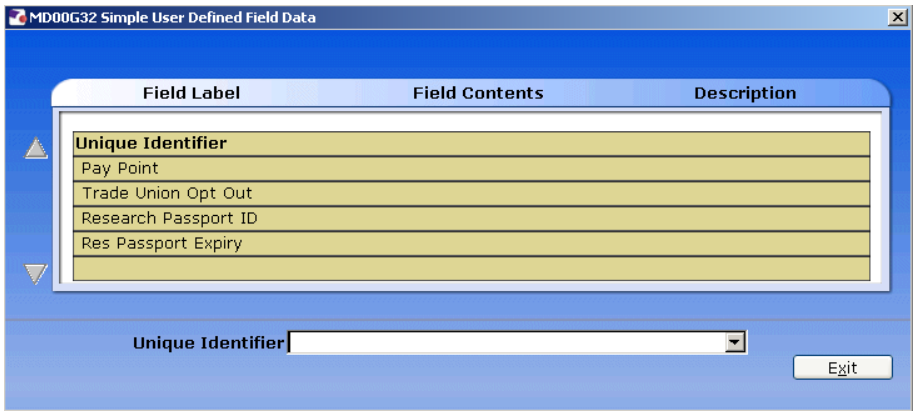
2.4 Enter all known details and click on **Exit**.

2.5 Click on **Email Address** to enter the email address details (if known).

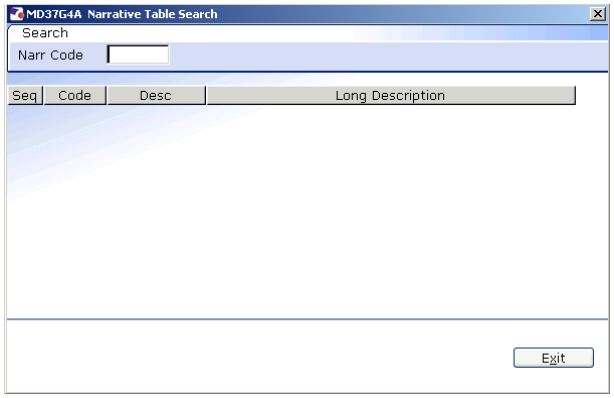


2.6 Enter the email address and click on **Exit**.

2.7 Click on **User Fields** to enter the **Unique Identifier** (not used at present) and the **Pay Point**.



2.8 Click on **Pay Point** and on the drop down arrow in the field. The following dialog box will appear.



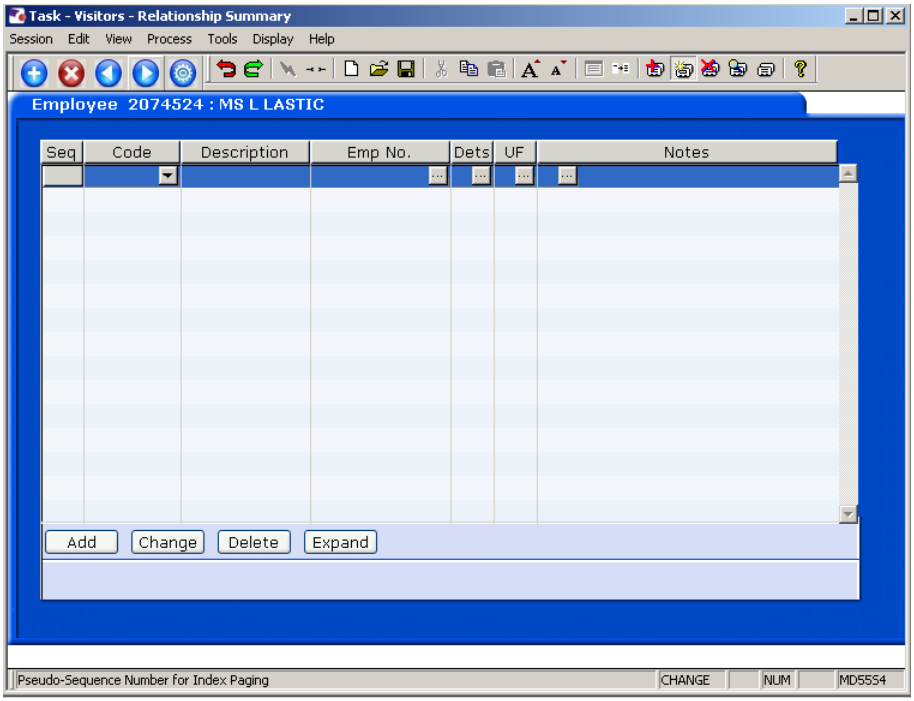
Press the **ENTER** key to display the list of available Pay Points.

2.9 Click on the required Pay Point.

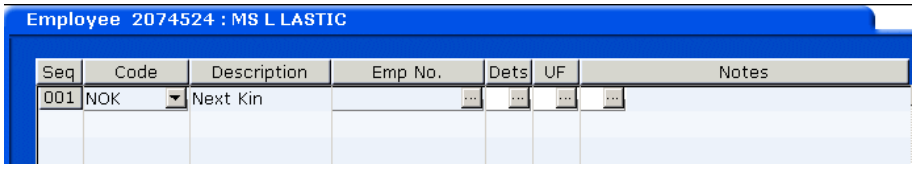
2.10 Click on **Exit**.

2.11 Click on to move to the next data entry screen.

3 Relationship data entry screen



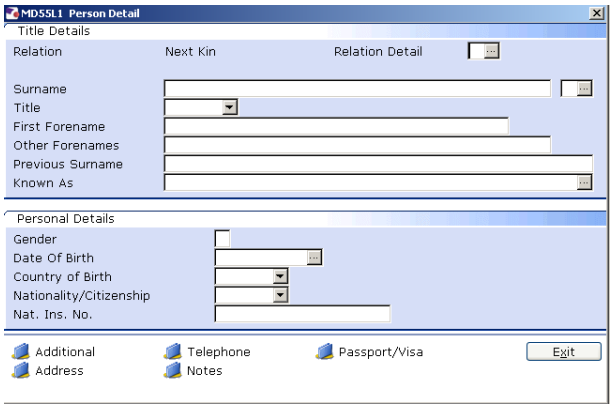
3.1 Click on **Add** to enter the details of the visitor's next of kin.



3.2 Click on the down arrow in the **Code** field and select **NOK**.

3.3 **ENTER** past the **Emp No.** field.

3.4 **Window in** to the **Dets** field and complete the known personal details for the employee's next of kin.



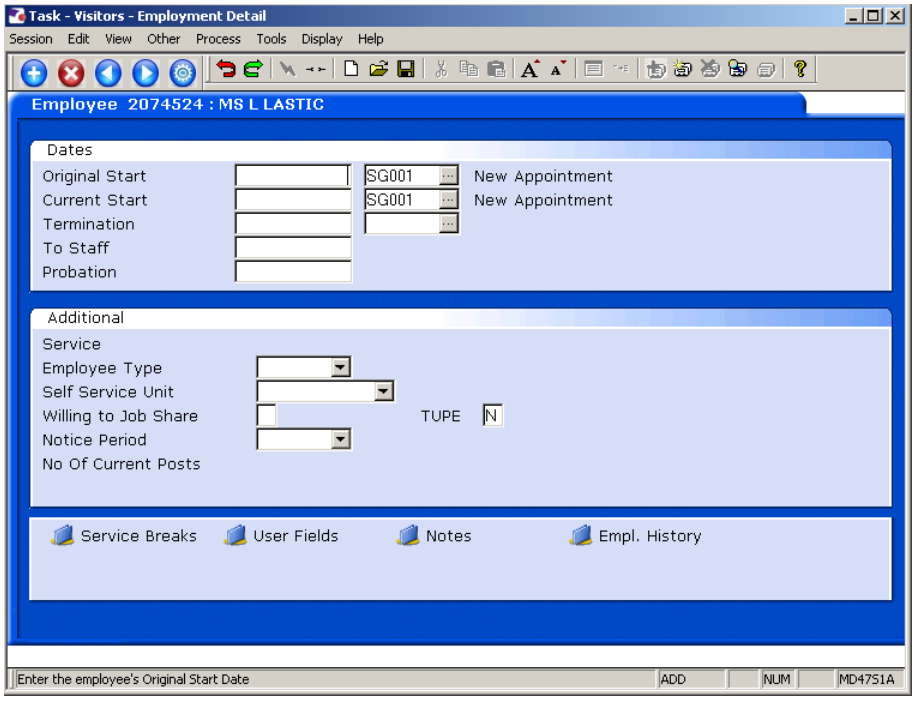
Click on the **Address** and **Telephone** fields to enter this information.

Click on **Exit**.

3.5 If you wish to add more than one next of kin contact repeat the steps

3.6 Click on to move to the next data entry screen.

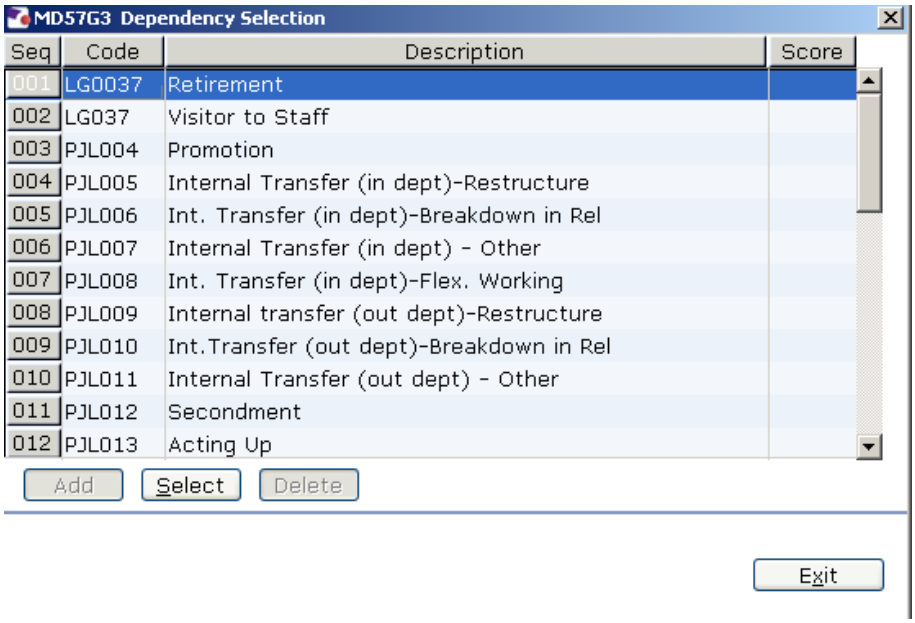
4 Employment Detail data entry screen



4.1 Click in the **Original Start** field and enter the start date of the Visitor.

Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

4.2 Click in the adjacent field and **window in.**



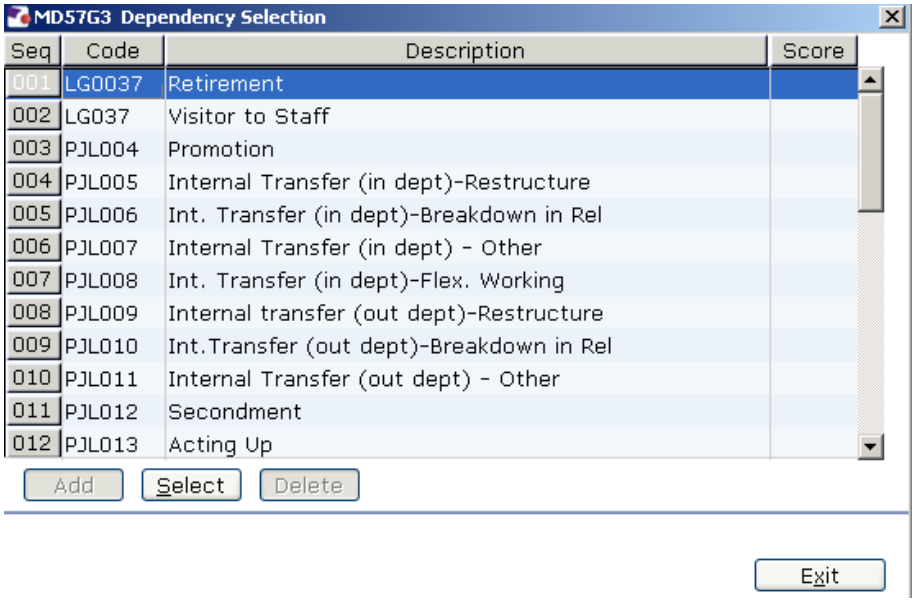
4.3 Click on **SG003 Visitor Appointment.**

4.4 Press **Enter**.

4.5 In the **Current Start** enter again the start date of the Visitor.

- Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

4.6 Click in the adjacent field and **window in.**

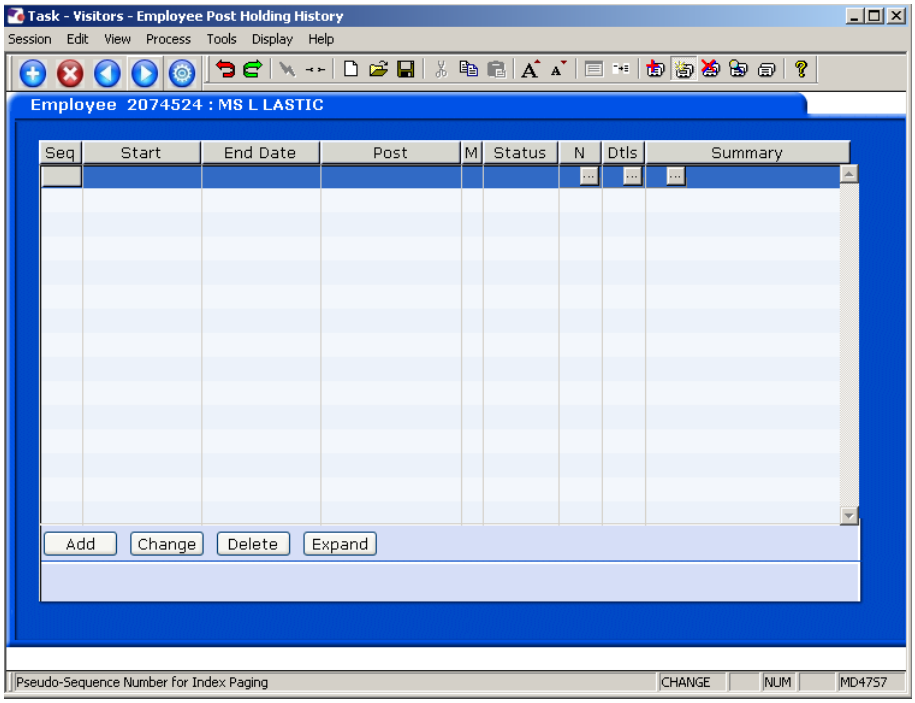


4.7 Click on **SG003 Visitor Appointment.**

4.8 Press **Enter**.

4.9 Click on to move to the next data entry screen.

5 Post Holding History data entry screen

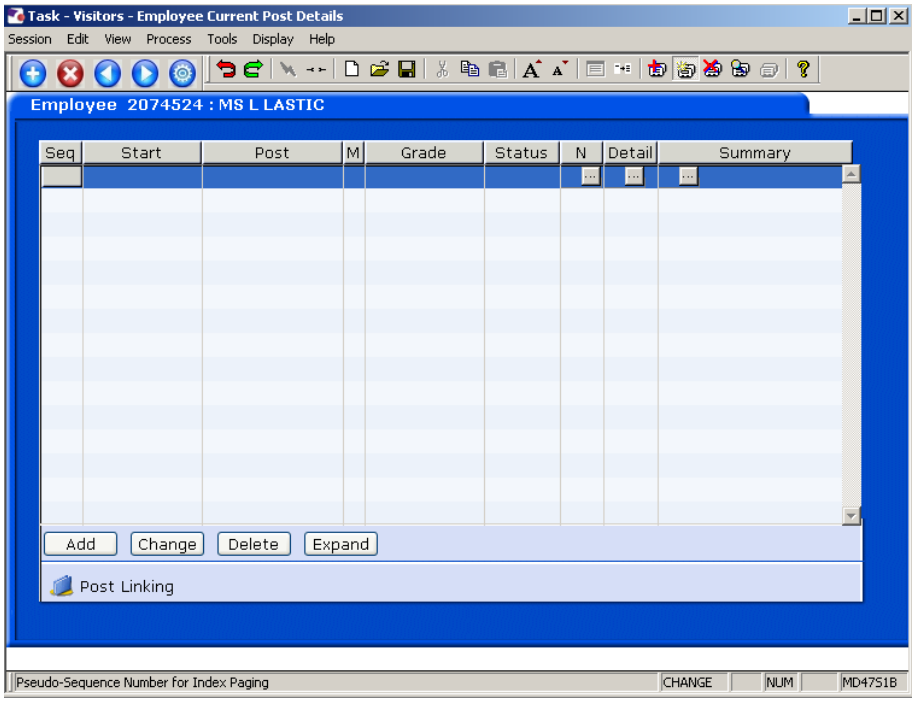


5.1 If this person is a new visitor to the University – this screen will be empty.

ⓘ This screen will only be used by Visitors returning to the University who are already in the system.

5.2 Click on to move to the next data entry screen.

6 Current Post Holding data entry screen



6.1 Click on **Add** to enter the Current Post Holding data for the visitor.

6.2 Type in the **Start Date**.

- Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

6.3 Press **ENTER**.

6.4 Type the Visitor Post Number (for the appropriate school/dept) into the **Post** field.

- The post number will often be a set of initials to denote the School or Department followed by the digits 00, a hyphen (-) and then VISIT. For example – **DK00-VISIT** for a visitor post in CAMS.

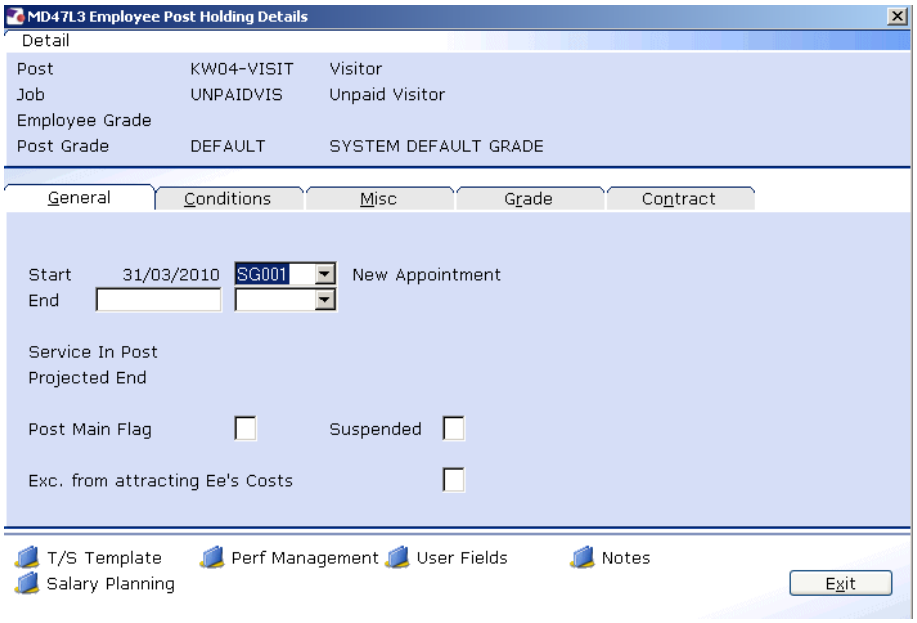
- Be aware however that bigger Schools or Department's Visitor posts will be slightly more specific. For example **KW04-VISIT** would refer to a visitor post in the School of Humanities in the English Department or Faculty. The second digit will specify the Department or Faculty within the School.

6.5 Press **Enter**.

6.6 Click on **OK**.

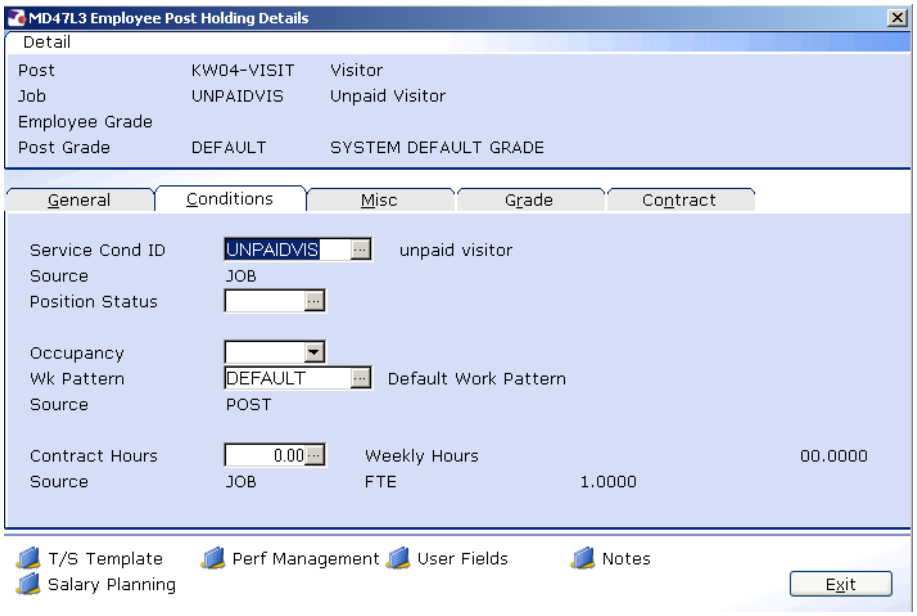
ⓘ If you see a dialog box warning that the FTE is being exceeded click on **Exit**.

6.7 Click in the **Details** field and **Window in**.

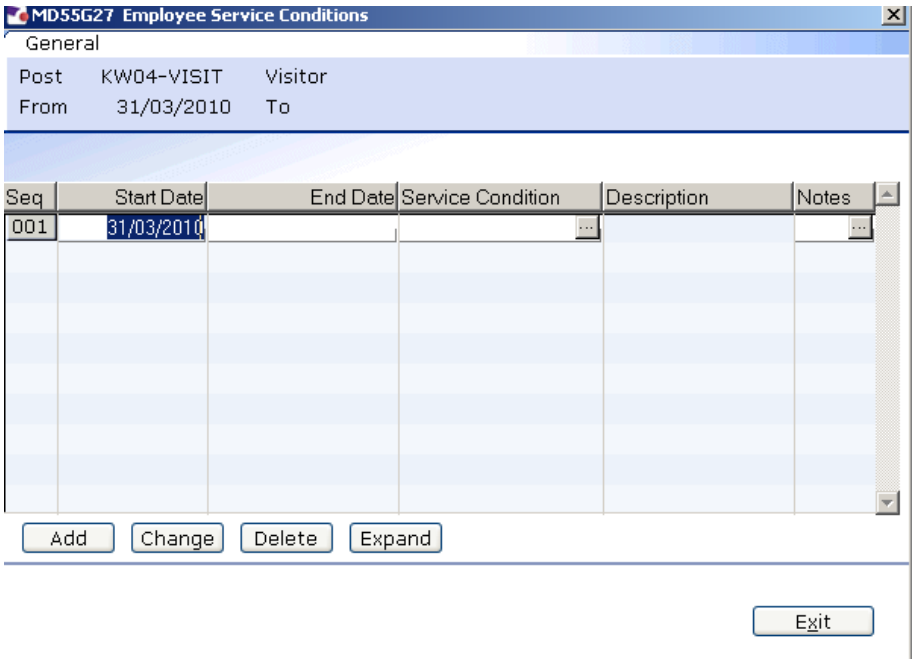


6.8 Click in **Post Main Flag** field and Type **Y**.

6.9 Press the **Enter** key to move through the remaining fields and on to the **Conditions** tab.



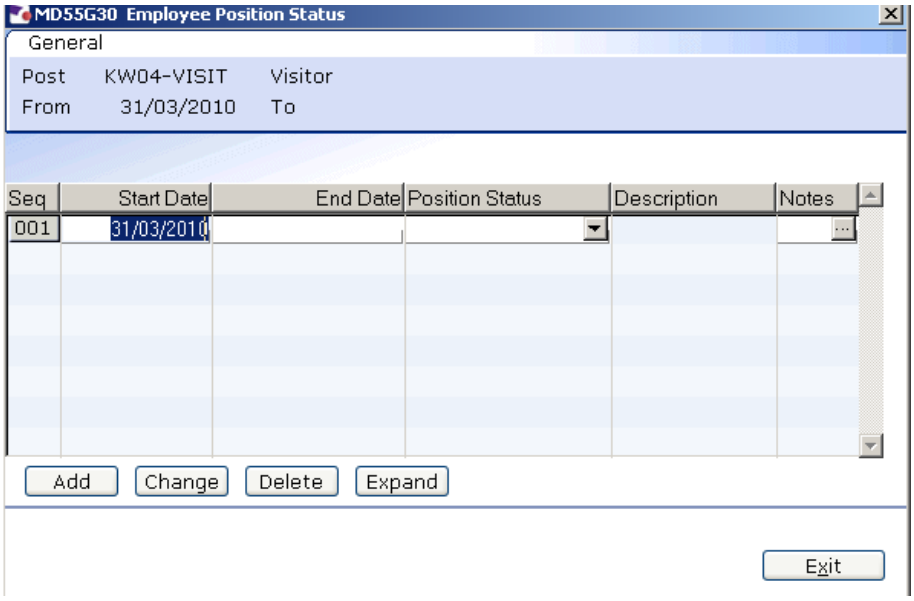
6.10 **Window in** to the **Service Cond ID** field



6.11 Click on **Add** and press **Enter** three times to pull through the Service Conditions.

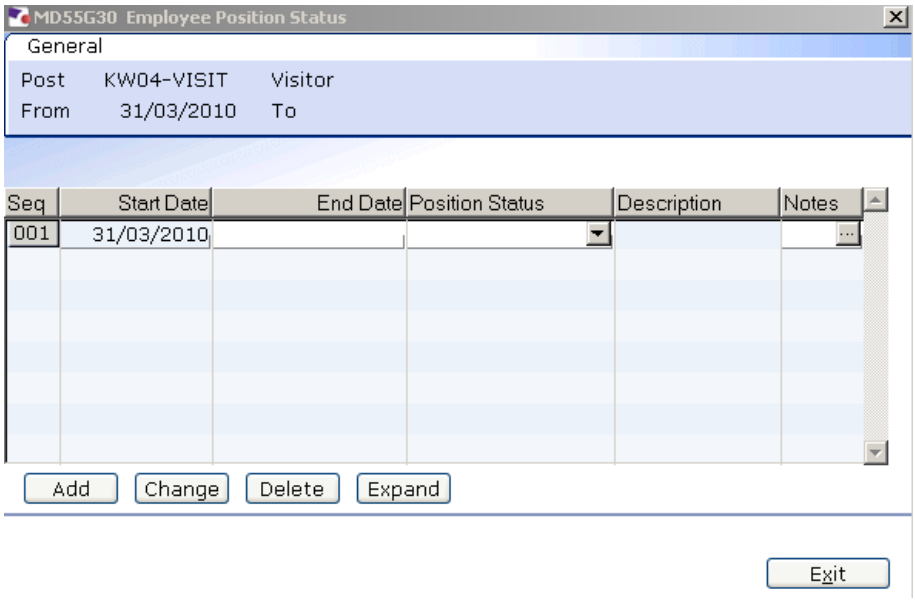
6.12 Click **Exit**.

6.13 **Window in** the **Position Status Field**. The following screen will appear:



6.14 Click on **Add**.

6.15 Press **Enter** twice to move to the **Position Status** field and display the drop down list.

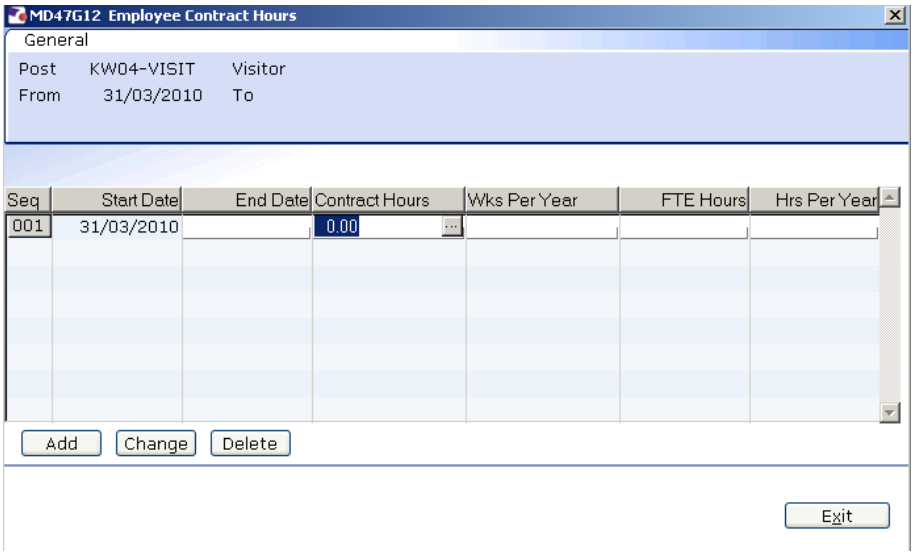


6.16 Select either **VISITOR1** or **VISITOR2** (depending on if they requires access to systems).

6.17 Press **Enter** to move through the remaining fields and click **Exit**.

6.18 Leave the **Wk Pattern** field as Default.

6.19 Window into the **Contract Hours** field:



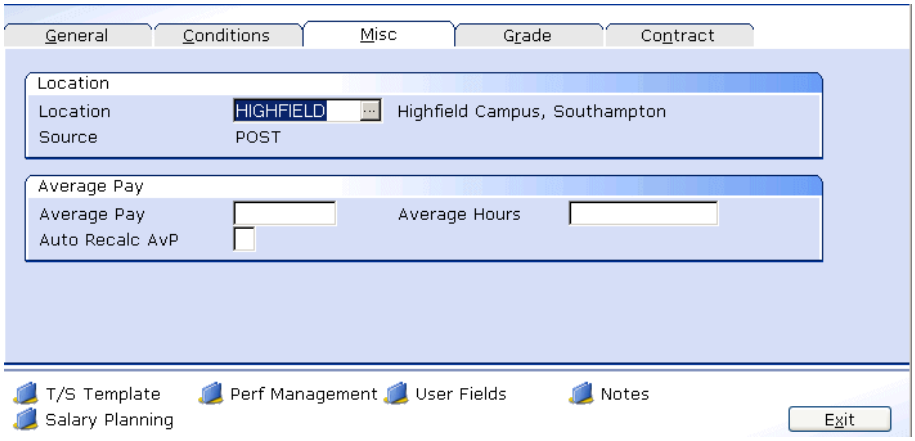
6.20 Enter through to the **Contract Hours** field and enter '**0**'

6.21 Enter through to the end of the row

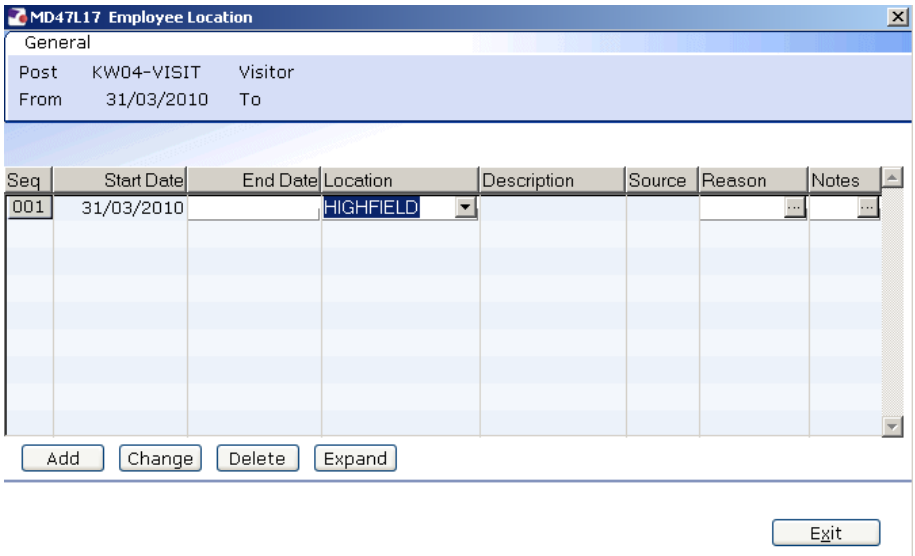
- You must window in to the Contract Hours field and ensure there is a start date and a figure in the “Contract Hours” column as above (even though it is a zero) otherwise the system will not view this record as being complete and will not include it in any reports.

6.22 Click on **Exit**

6.23 Click on to the **Misc** tab.



6.24 **Window in** to the **Location** field.



6.25 Click on **Add** and press **Enter** twice.

6.26 Select the location from the **Location** field drop down list.

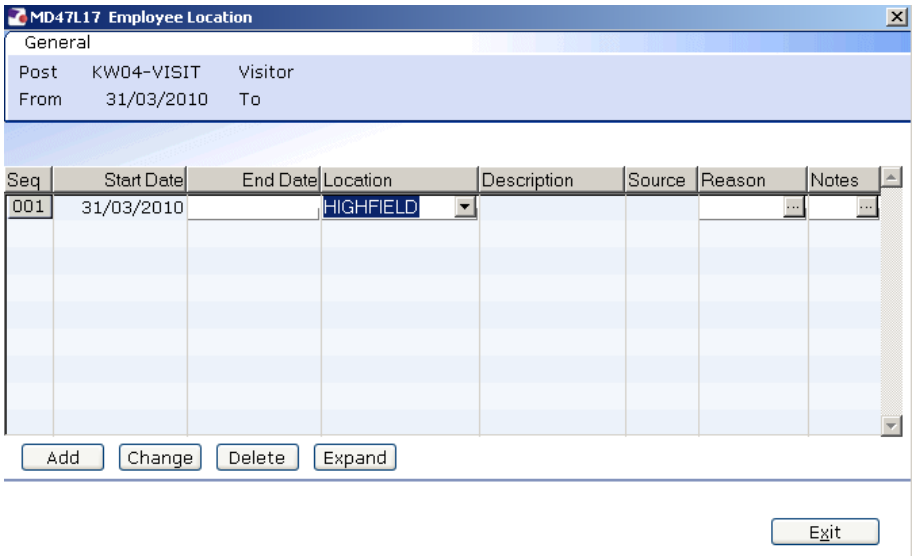
6.27 Press **Enter**.

6.28 **Window in** to the **Reason** field and select **SG003 Visitor Appointment**.

6.29 Press **Enter**.

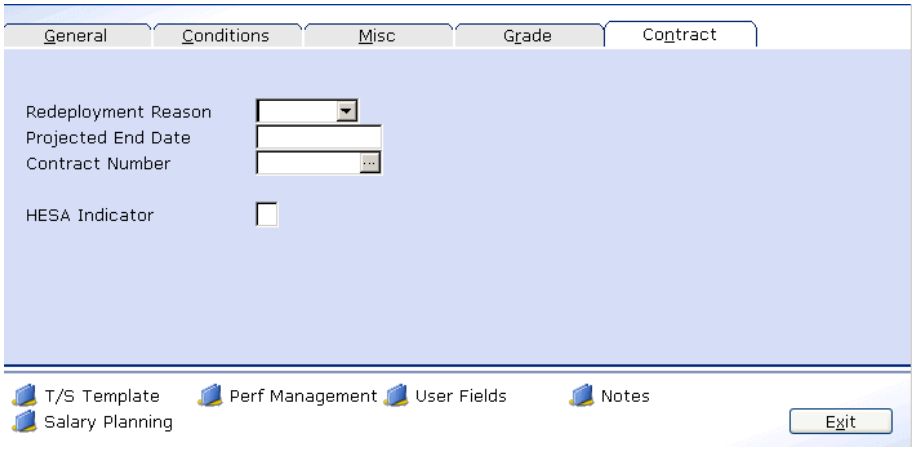
6.30 Click **Exit**.

6.31 Click on the **Grade** tab.



Do not complete this tab.

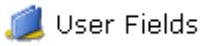
6.32 Click on the **Contract** tab.



6.33 Click in the **Projected End Date** field.

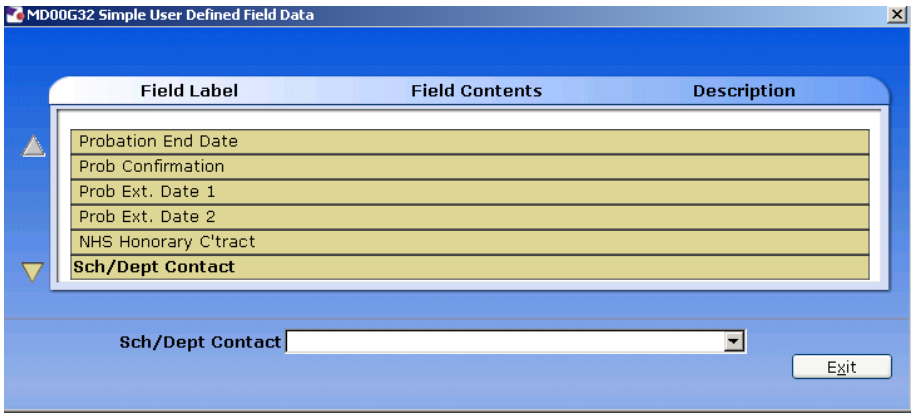
6.34 Enter the date the visit is expected to finish.

6.35 Enter a **"N"** in the **HESA Indicator** field (this indicates that as this person is a visitor they should not be included in the HESA return).

6.36 Click on the **User Field** icon at the bottom of the screen 

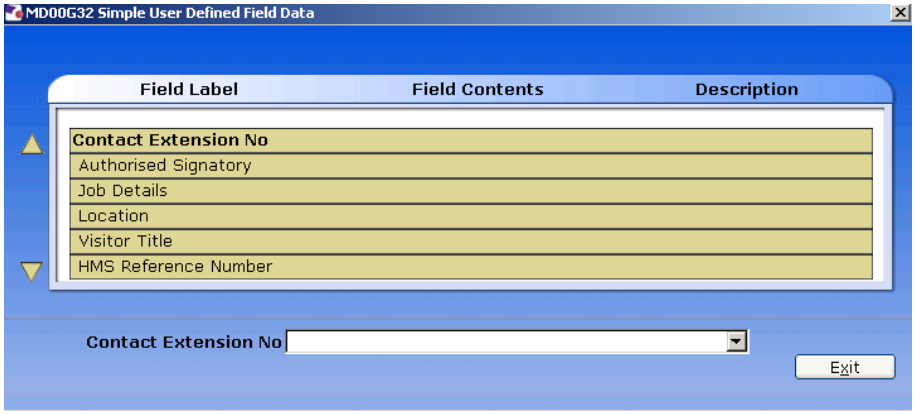
6.37 Click in the **School/Dept Contact** field

6.38 Type the name of the **Contact**



6.39 Press **Enter**

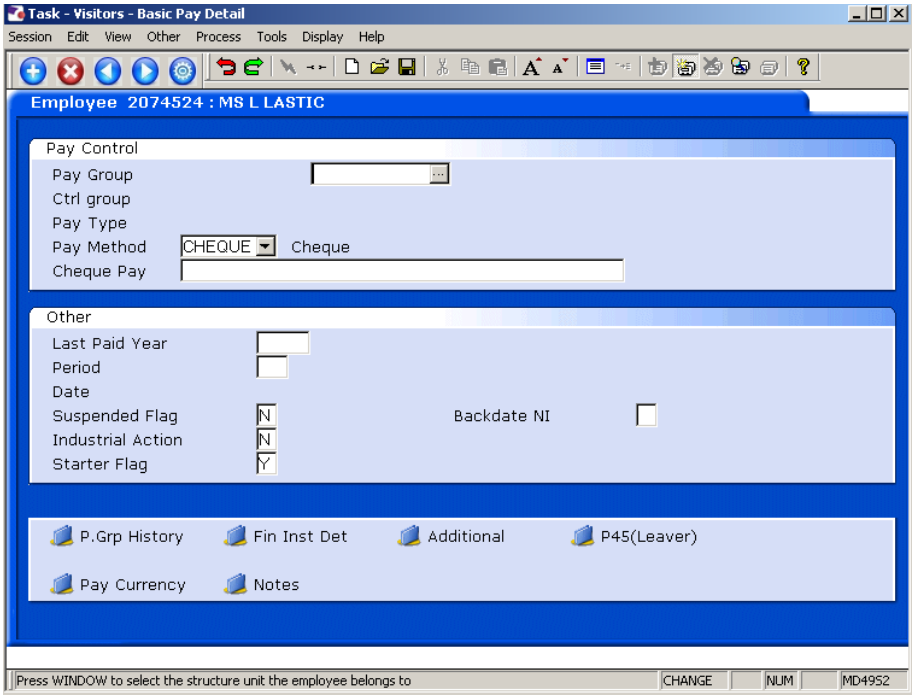
6.40 Type the **Contact Ext No** in the highlighted field



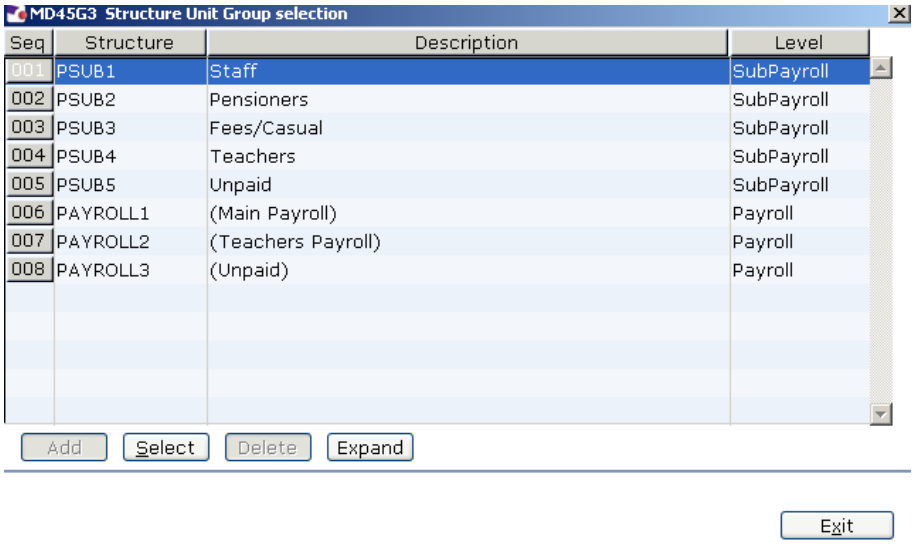
6.41 Press **ENTER** and click on **Exit**.

6.42 Click on to move to the next data entry screen.

7 Basic Pay Details data entry screen

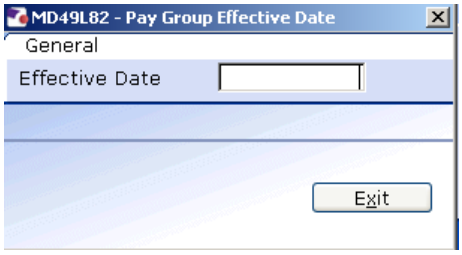


7.1 **Window in** to the **Pay Group** field.



7.2 Select the **PSUB5** Pay Group.

7.3 The following dialogue box will appear



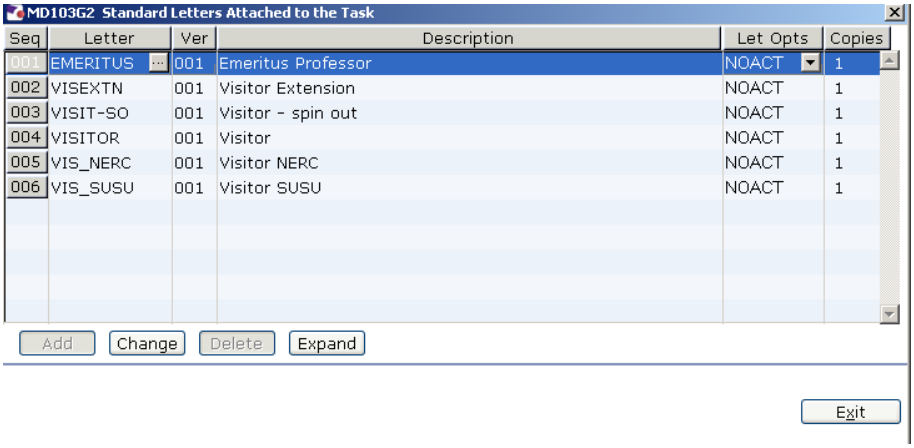
Type the **start date** into the **Effective Date** field and press **Enter**.

- Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

7.4 Ensure the **Pay method** field is set as **Cheque**.

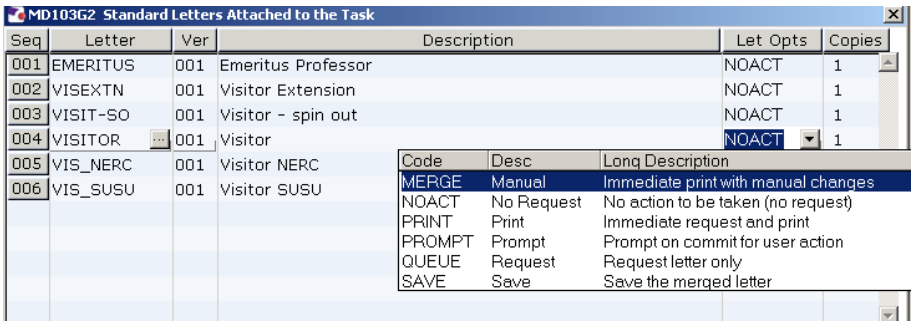
7.5 There are no more tabs to complete, click on **Save.**

8 Standard letters



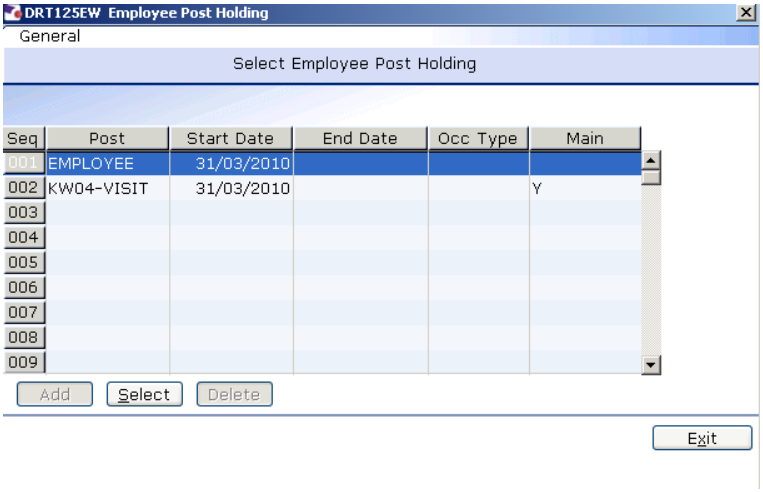
8.1 Click in the **Let Opts** field of the standard letter you want to produce

8.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.

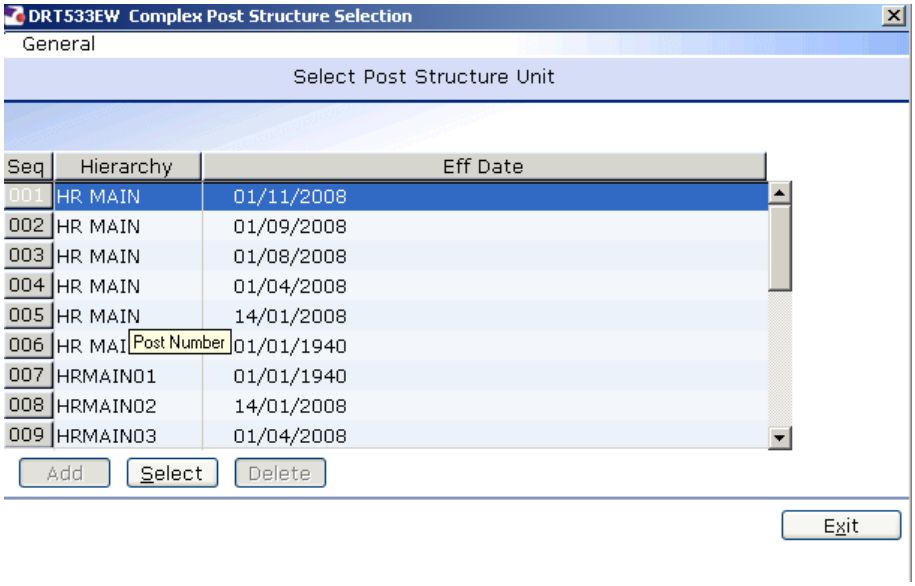


8.3 Click on **Exit.**

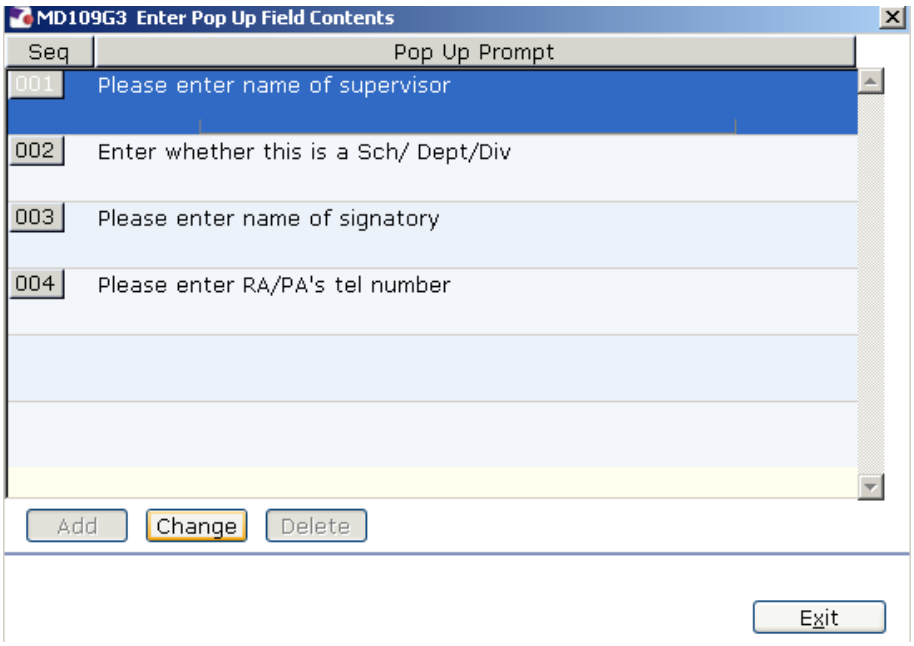
8.4 Select appropriate Post



8.5 Select the latest hierarchy



8.6 Complete the following form



8.7 Click in the first row and type the name of the visitor's supervisor.

8.8 Click in the second row and type in the if Sch/Dept/Div.

8.9 Click in the third row and type the signatory's name.

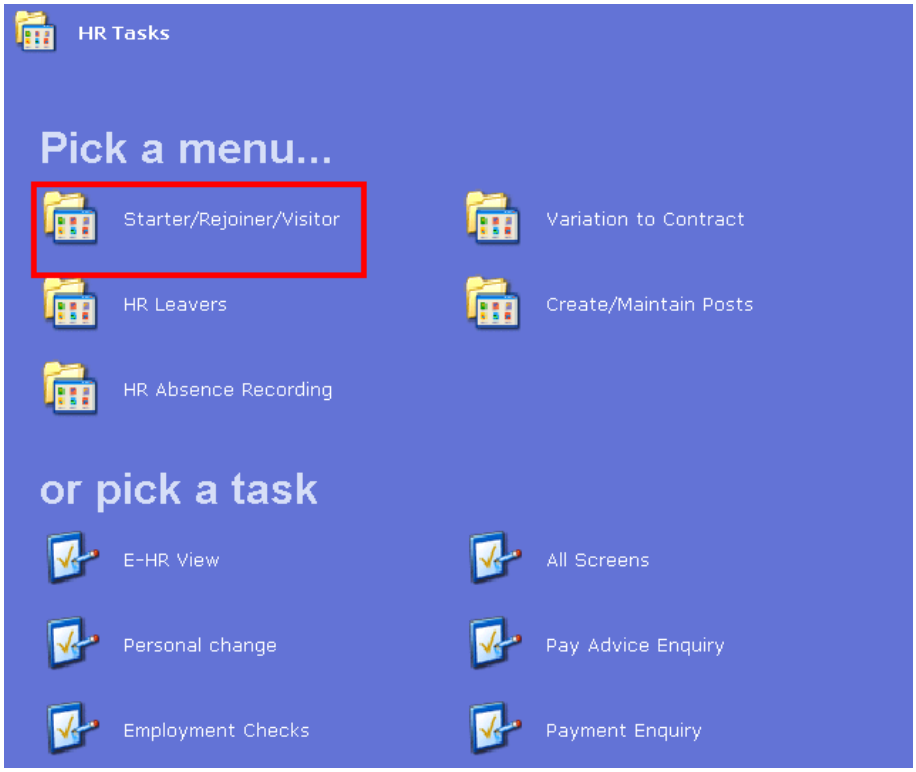
8.10 Click on the fourth row and type the signatory's telephone number.

8.11 Click on **Exit**.

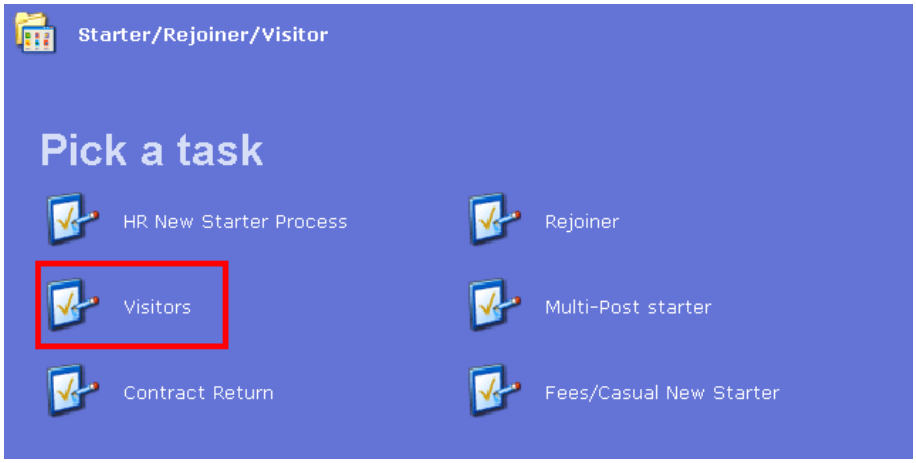
8.12 The visitor's letter should generate in **Word** and you can print as normal.

9 Returning Visitors

9.1 Move into the Visitor Task

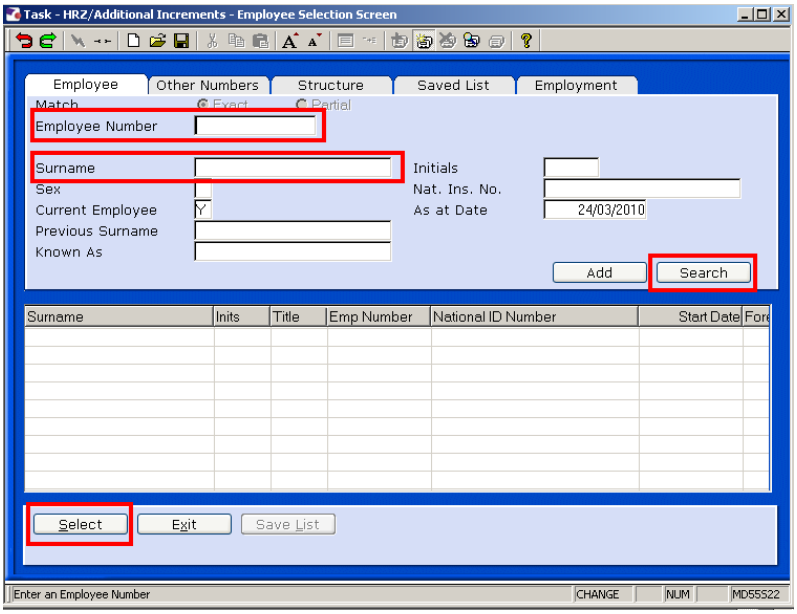


9.2 Select Visitors



9.3 You will always need to find employees' records on the system. If you already know their staff number you can go straight to the task required.

9.4 The following search form is made available



9.5 The Employee Number, Surname, search and select options are highlighted

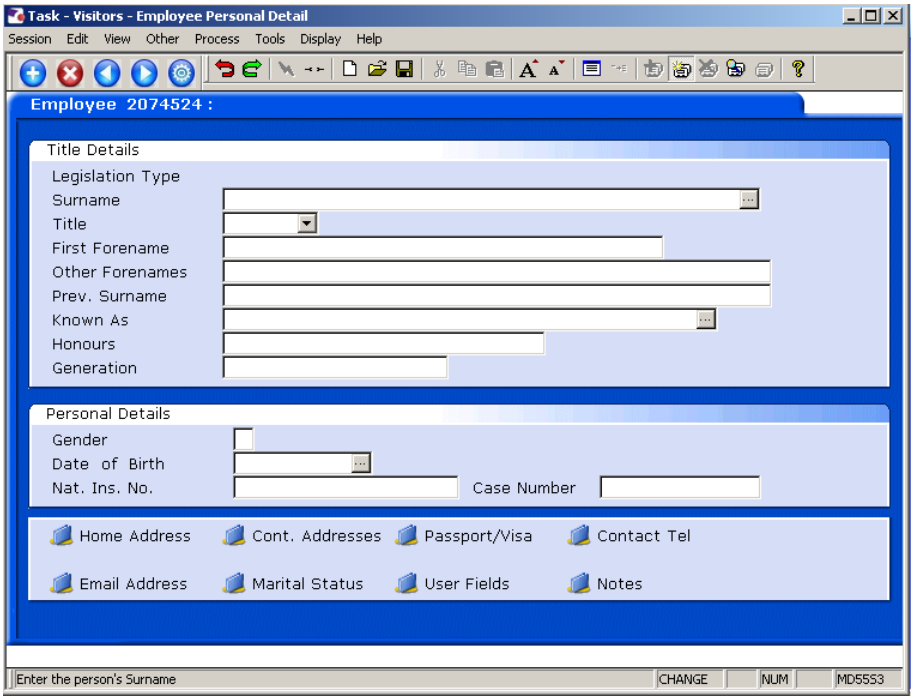
9.6 Entering either the Employee Number or Surname select search.

9.7 Select the appropriate staff member from the list

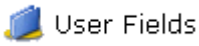
9.8 A warning screen will appear:

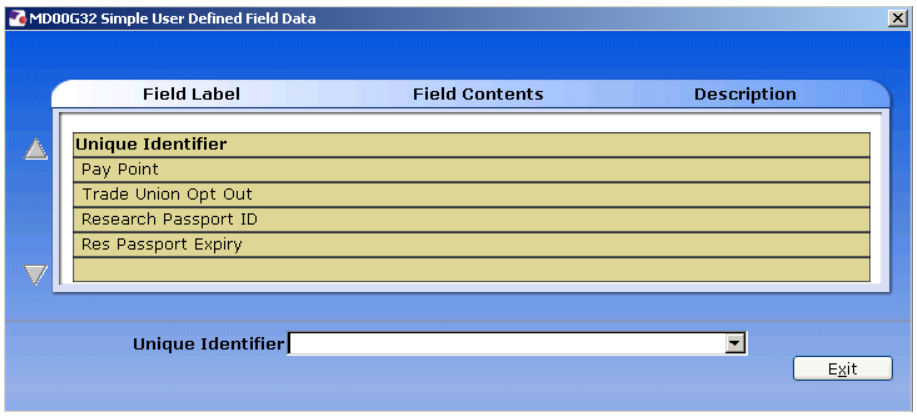
9.9 Click on OK – this identifies that this visitor is on the system but has left.

10 Personal Details data entry screen

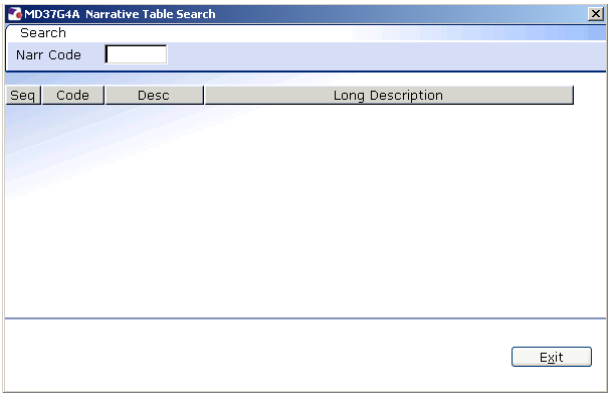


10.1 The Personal Details screen should already be completed, check and update fields where necessary

10.2 Click on **User Fields** 



10.3 Click on **Pay Point** and on the drop down arrow in the field. The following dialog box will appear.



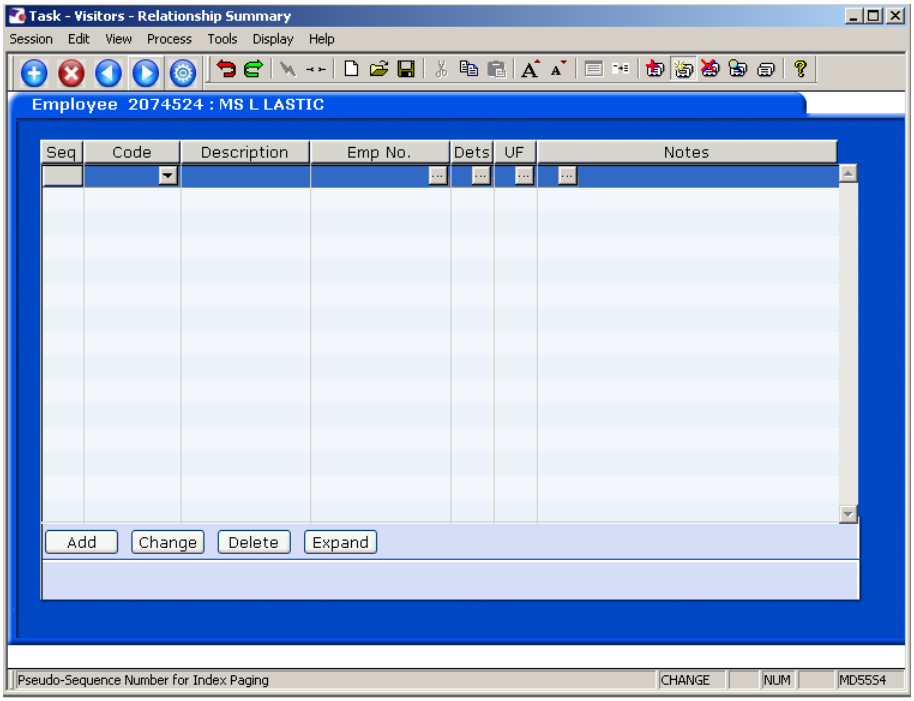
10.4 Press the **ENTER** key to display the list of available **Pay Points**.

10.5 Click on the required Pay Point.

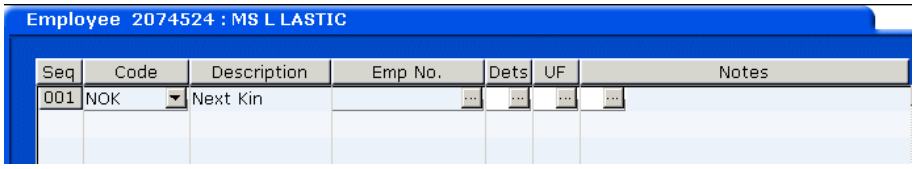
10.6 Click on **Exit**.

10.7 Click on to move to the next data entry screen.

11 Relationship Summary data entry screen



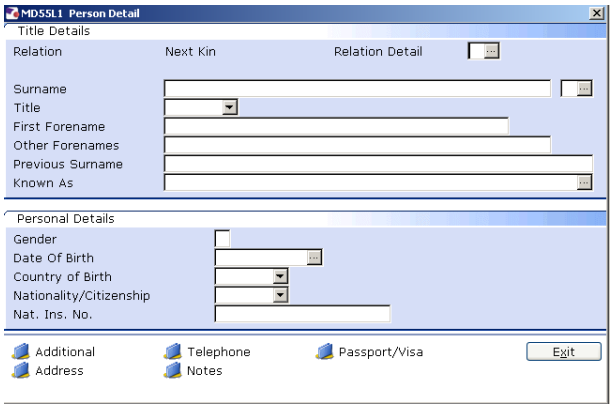
11.1 Click on **Add** to enter the details of the visitor's next of kin.



11.2 Click on the down arrow in the **Code** field and select **NOK**.

11.3 **ENTER** past the **Emp No.** field.

11.4 **Window in** to the **Dets** field and complete the known personal details for the visitor's next of kin.



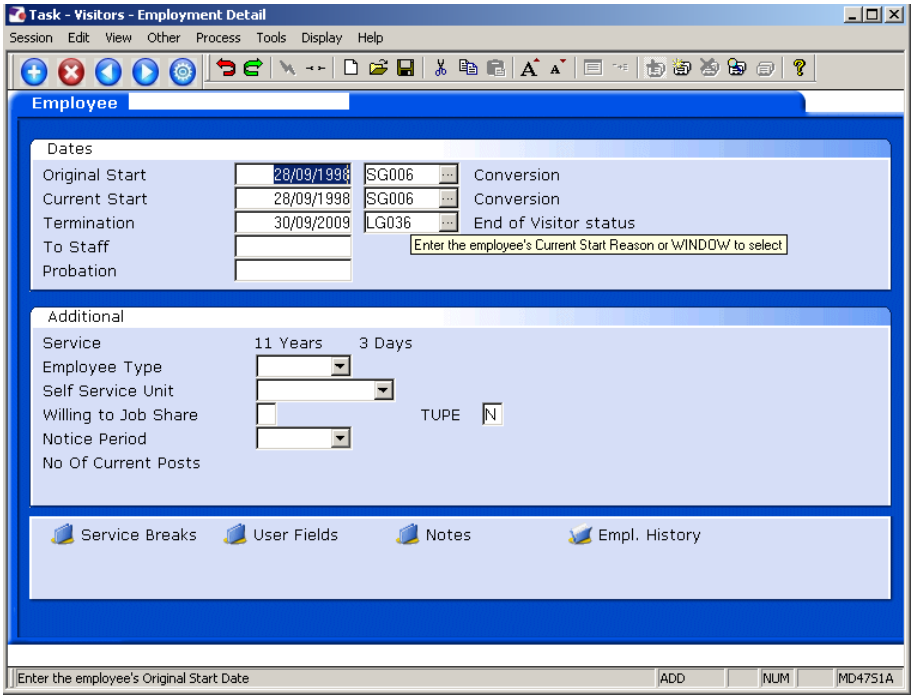
11.5 Click on the **Address** and **Telephone** fields to enter this information.

11.6 Click on **Exit**.

11.7 If you wish to add more than one next of kin contact repeat the steps in 3.1

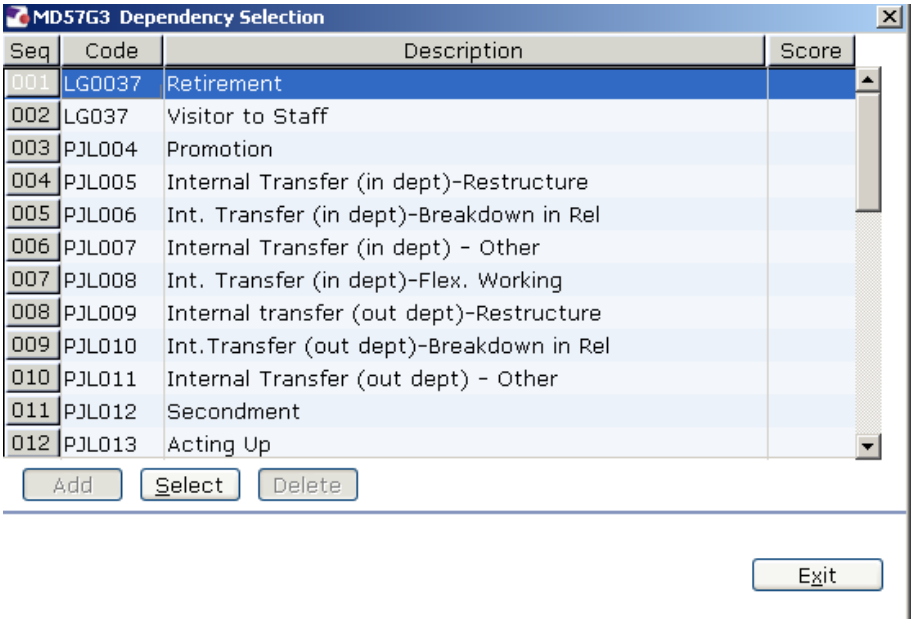
11.8 Click on to move to the next data entry screen.

12 Employment Detail data entry screen



12.1 Click in the **Current Start** field and the date from which their visit commences.

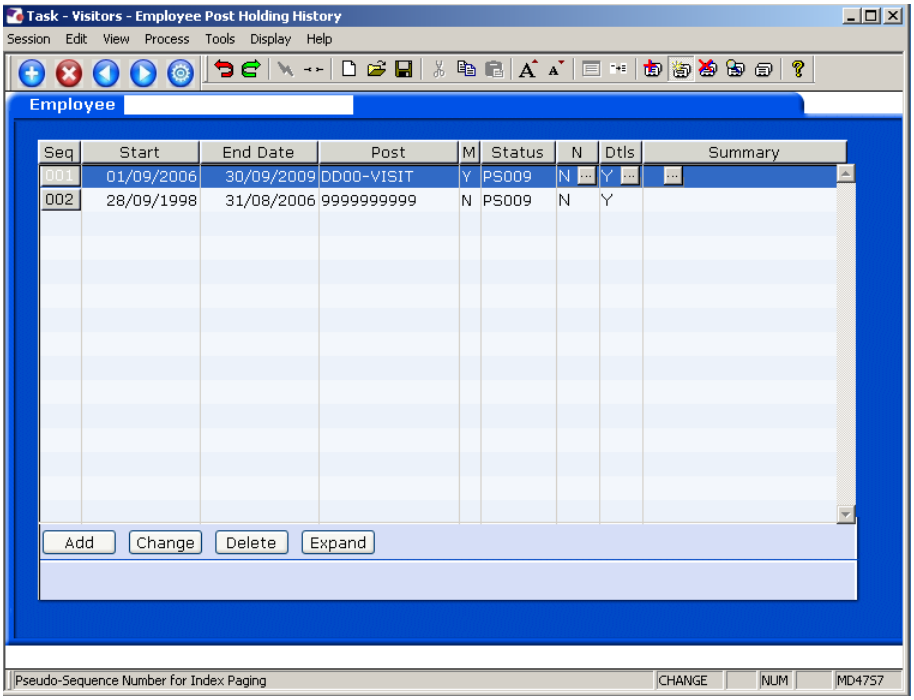
12.2 In the adjacent field to **Current Start**, window in and select **SG003 – Visitor Appointment**.



12.3 Press **Enter**.

12.4 Click on to move to the next data entry screen.

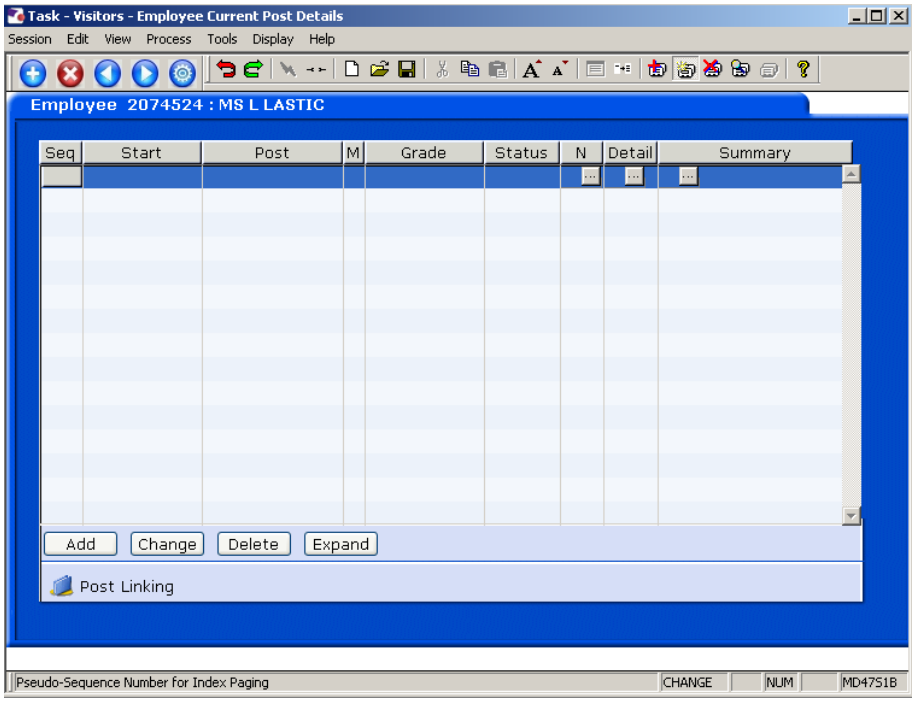
13 Post Holding History data entry screen



ⓘ This screen will list each time the visitor has visited the University, with the start and end dates of each visit.

13.1 Click on to move to the next data entry screen.

14 Current Post Holding data entry screen



14.1 Click on **Add** to enter the Current Post Holding data for the visitor.

14.2 Type in the **Start Date**.

> Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

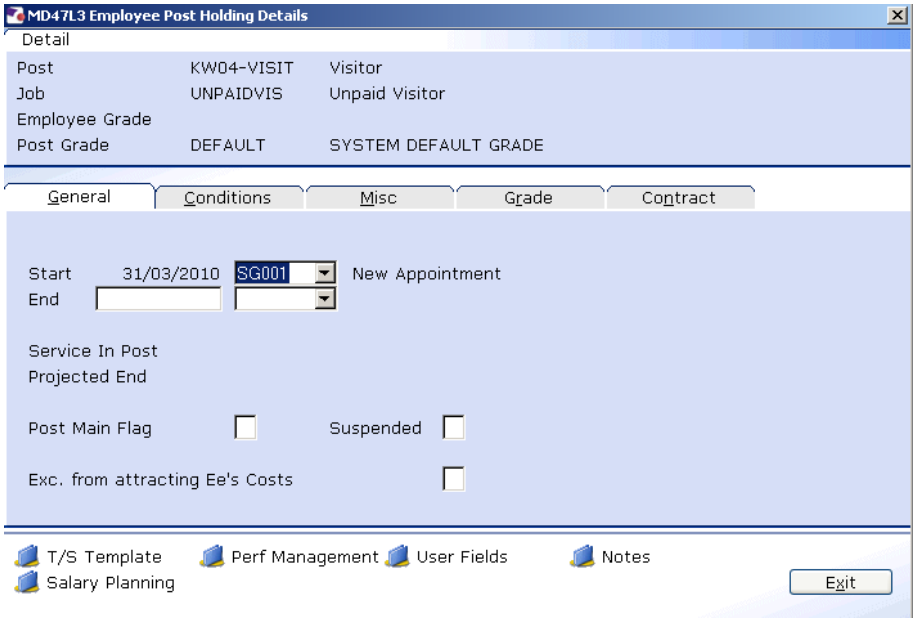
14.3 Press **ENTER**.

14.4 Type the Visitor Post Number (for the appropriate school/dept) into the **Post** field.

14.5 Press **Enter**.

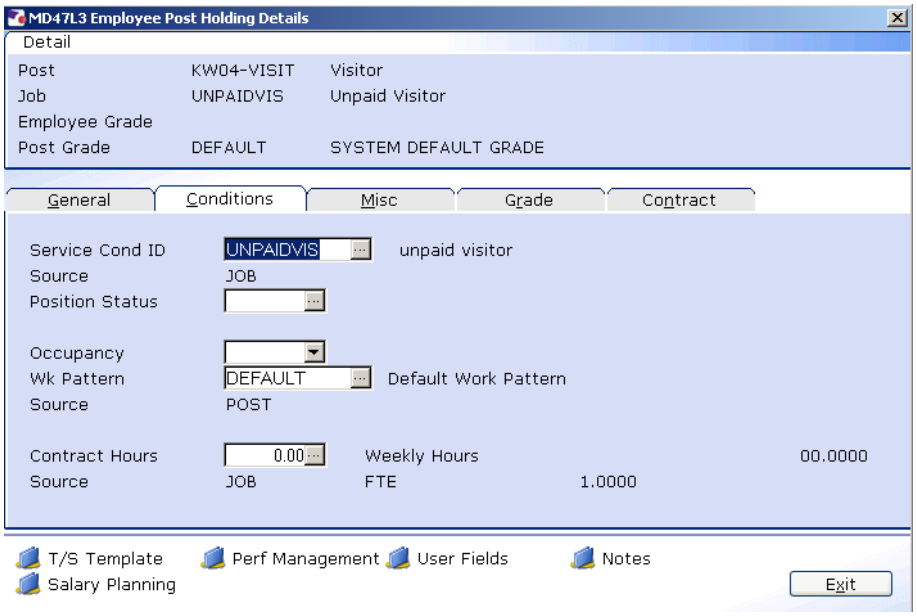
> If you see a dialog box warning that the FTE is being exceeded click on **Exit**.

14.6 Click in the **Details** field and **Window in**.

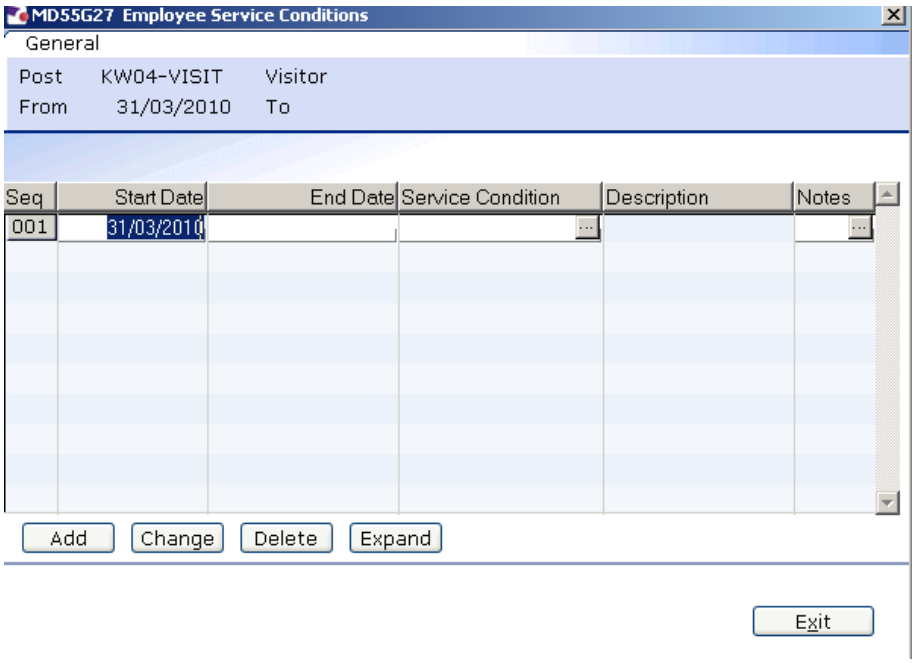


14.7 Click in **Post Main Flag** field and Type **Y**.

14.8 Press the **Enter** key to move through the remaining fields and on to the **Conditions** tab.



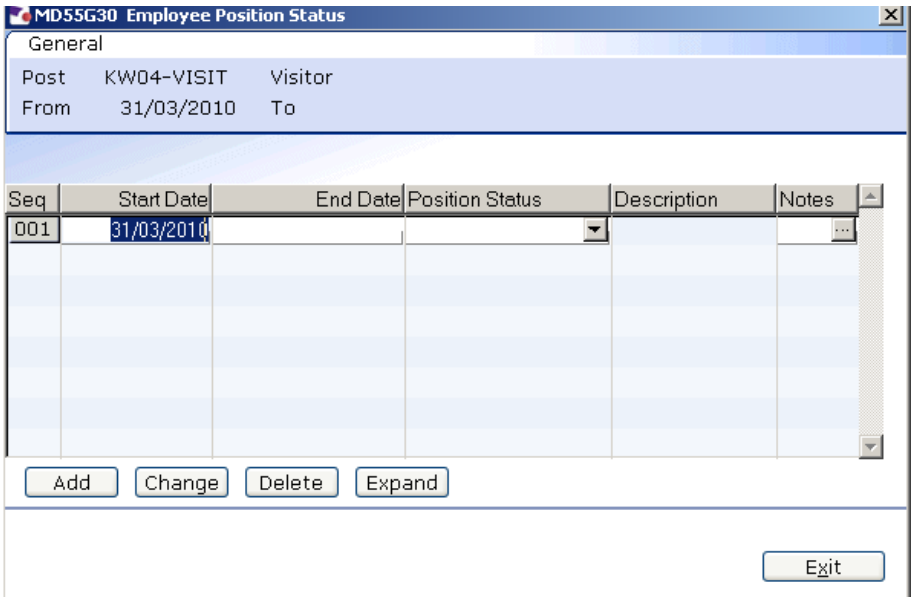
14.9 **Window in** to the **Service Cond ID** field



14.10 Click on **Add** and press **Enter** three times to pull through the Service Conditions. The service condition should be **UNPAIDVIS**.

14.11 Click **Exit**.

14.12 **Window in** the **Position Status Field**. The following screen will appear:



14.13 Click on **Add**.

14.14 Press **Enter** twice to move to the **Position Status** field and display the drop down list.

Code	Desc	Long Description
PS003	TTOP	Term Time Only - Permanent
PS004	TTOFT	Term Time Only - Fixed Term
PS005	FTFT	Full Time - Fixed Term
PS006	PTFT	Part Time - Fixed Term
PS007	TBANK	Temp Bank
PS008	CASUAL	Casual Staff
PS009	VISITOR1	Visitor - Requires System Access
PS010	VISITOR2	Visitor - No System Access

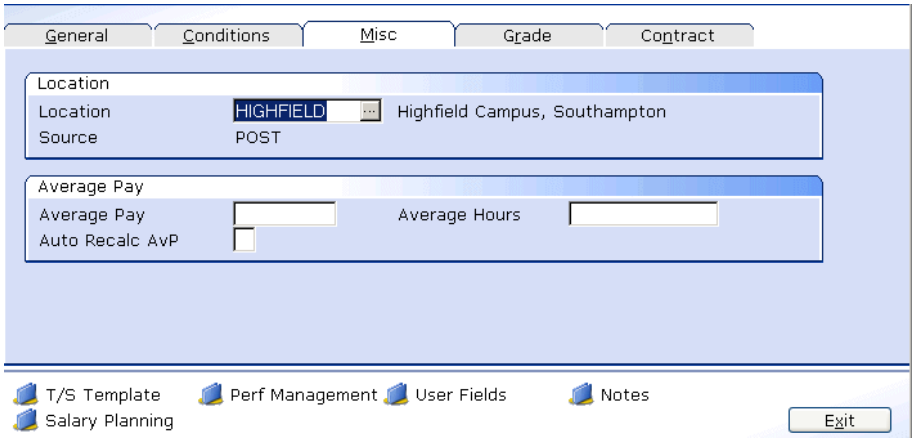
14.15 Select either **VISITOR1** or **VISITOR2** (depending on if they requires access to systems).

14.16 Press **Enter** to move through the remaining fields and click **Exit**.

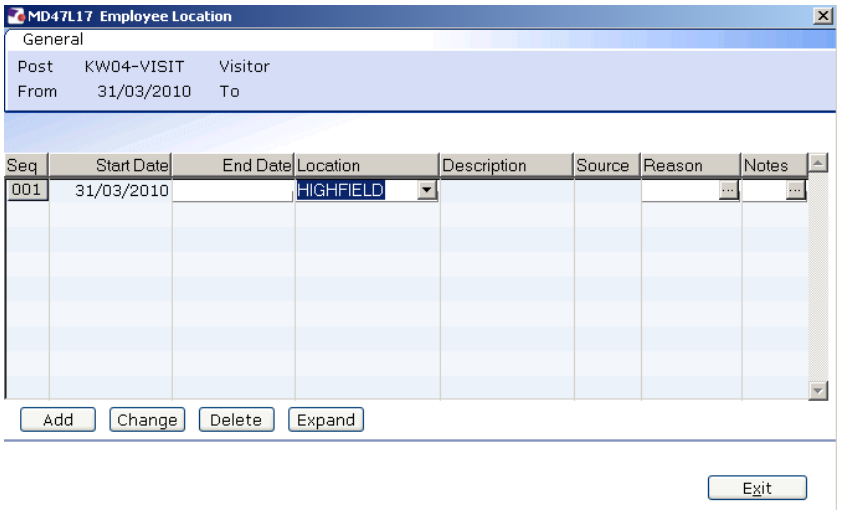
14.17 Leave the **Wk Pattern** field as Default.

14.18 Leave the **Contract Hours** field as 0.

14.19 Click on to the **Misc** tab.



14.20 **Window in** to the **Location** field.



14.21 Click on **Add** and press **Enter** twice.

14.22 Select the location from the **Location** field drop down list.

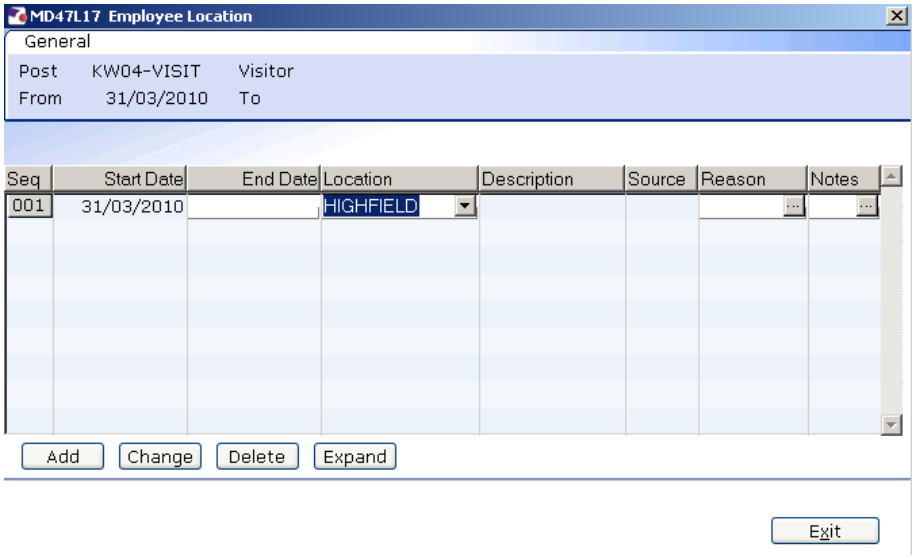
14.23 Press **Enter**.

14.24 **Window in** to the **Reason** field and select **SG003 Visitor Appointment**.

14.25 Press **Enter**.

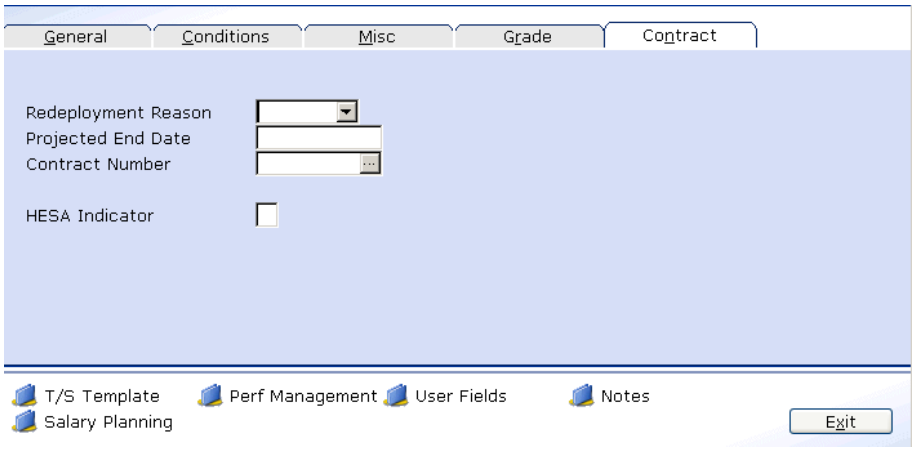
14.26 Click **Exit**.

14.27 Click on the **Grade** tab.



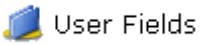
ⓘ **Do not complete this tab.**

14.28 Click on the **Contract** tab.



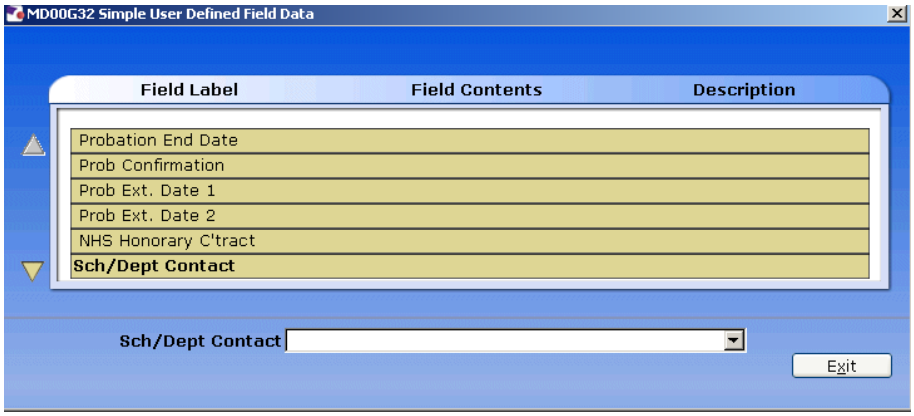
14.29 Click in the **Projected End Date** field.

14.30 Enter the date the visit is expected to finish.

14.31 Click on the **User Field** icon at the bottom of the screen 

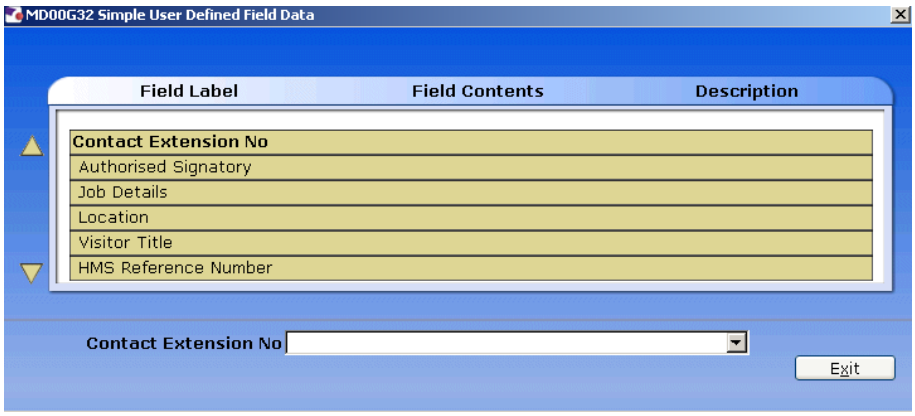
14.32 Click in the **School/Dept Contact** field

14.33 Type the name of the **Contact**



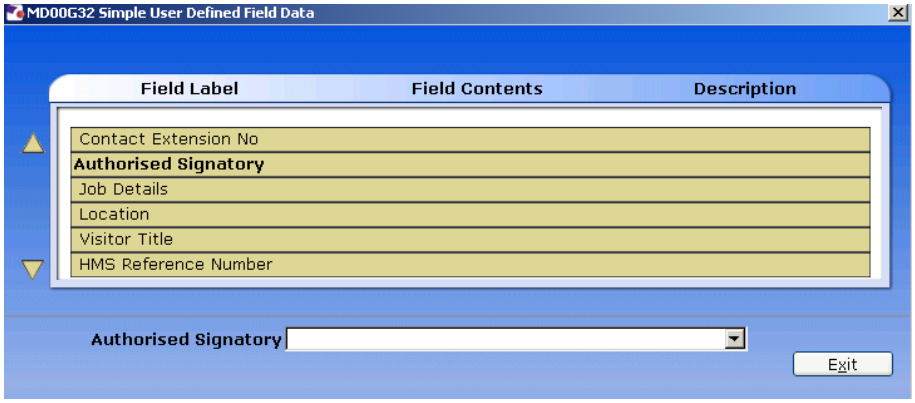
14.34 Press **Enter**

14.35 Type the **Contact Ext No** in the highlighted field



14.36 Press **Enter**

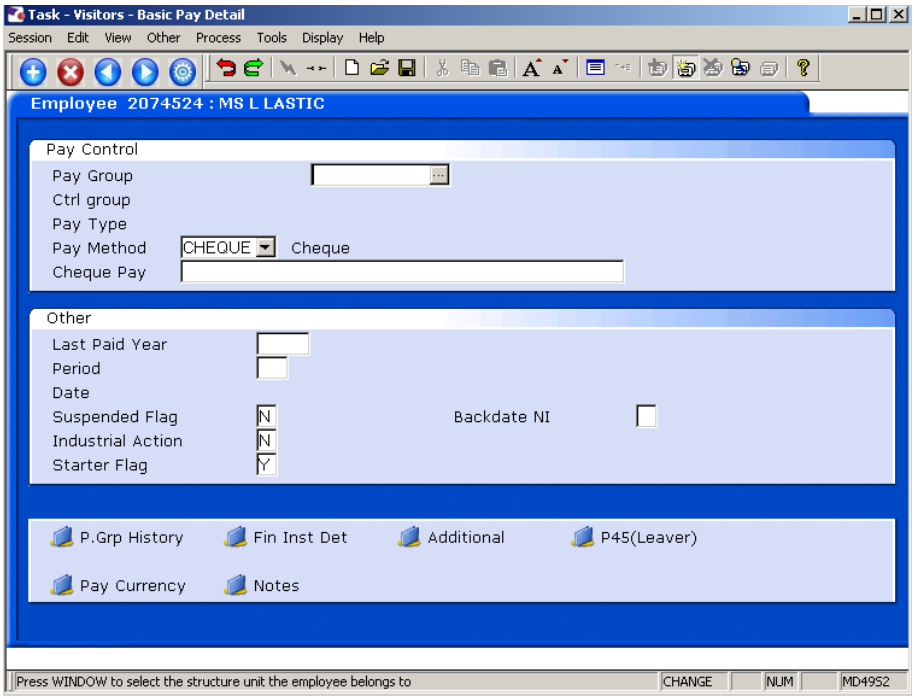
14.37 Type the name of the **Authorised Signatory** in the highlighted field



14.38 Press **ENTER** and click on **Exit**.

14.39 Click on to move to the next data entry screen.

15 Basic Pay Details data entry screen



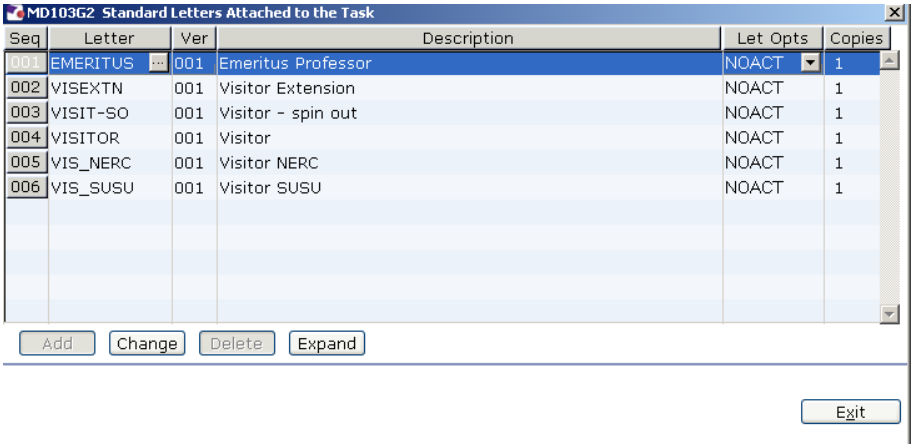
15.1 Check that the **Pay Group** is set as **PSUB5**.

15.2 If not, window in and select **PSUB5**.

15.3 Ensure the **Pay method** is set as **Cheque**.

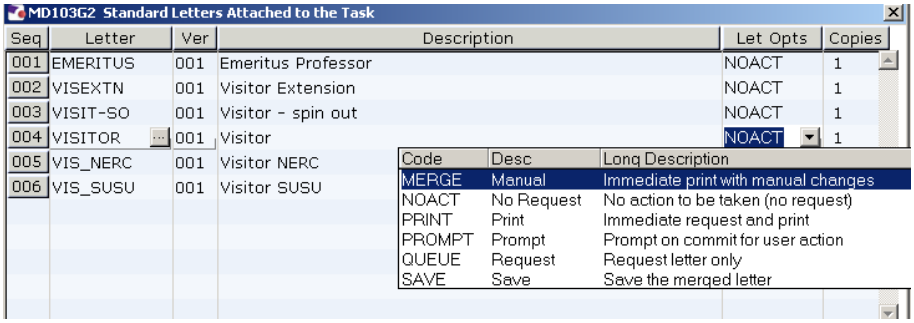
15.4 There are no more tabs to complete, click on **Save.**

16 Standard letters



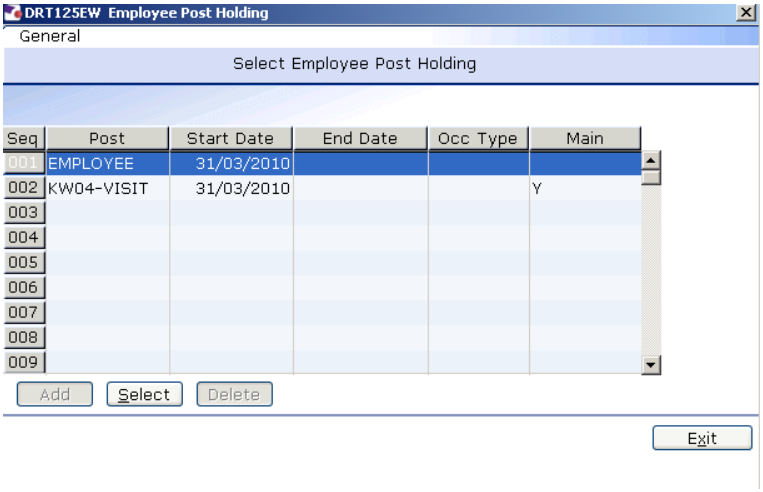
16.1 Click in the **Let Opts** field of the standard letter you want to produce

16.2 Click on the drop down and select **MERGE – Immediate print with manual changes**.

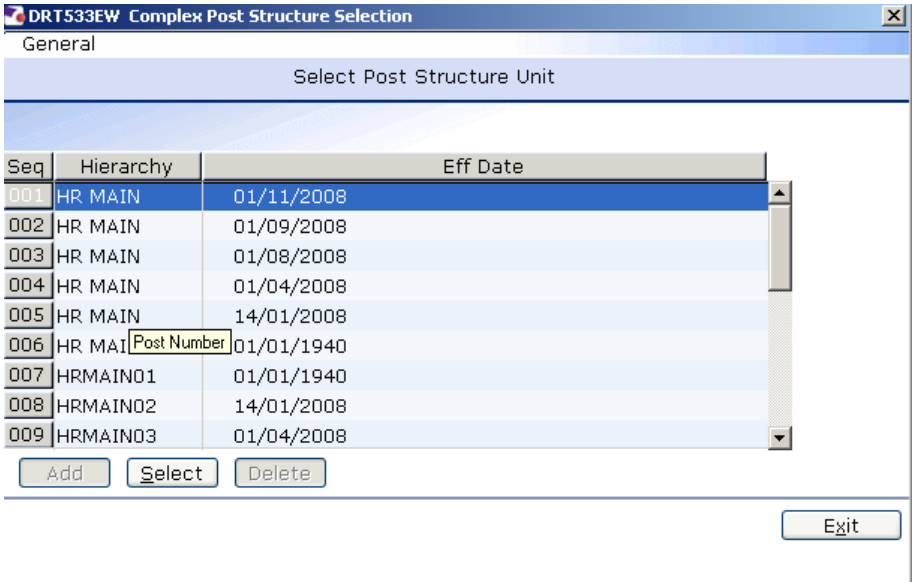


16.3 Click on **Exit.**

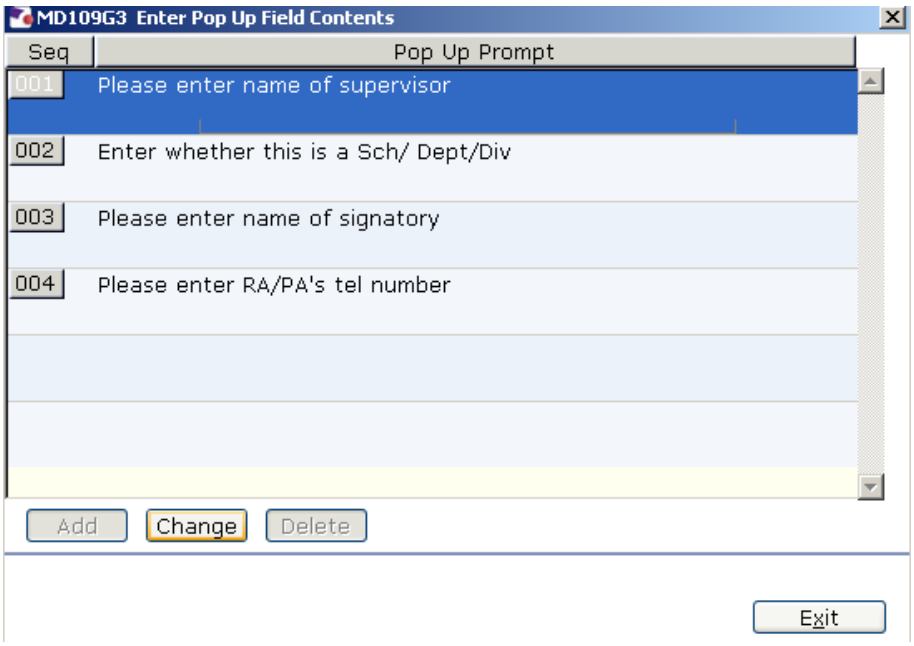
16.4 Select appropriate Post



16.5 Select the latest hierarchy



16.6 Complete the following form



16.7 Click in the first row and type the name of the visitor's supervisor.

16.8 Click in the second row and type in the if Sch/Dept/Div.

16.9 Click in the third row and type the signatory's name.

16.10 Click on the fourth row and type the signatory's telephone number.

16.11 Click on **Exit**.

16.12 The visitor's letter should generate in **Word** and you can print as normal.