UNIFOCUS
WORKFORCE MANAGEMENT

Release Document

Module 1: Designation, Department and Skill

Module 2: Quick Jobs

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Contents

DESIGNATION, DEPARTMENT AND SKILL

INTRODUCTION

This release introduces the Designation, Department and Skill module, a versatile tool for configuring designations, departments, and skills within our software. This document outlines the release details and provides comprehensive information on its functionality.

This document targets administrators, IT personnel, and end-users who will be configuring and utilizing designations, departments, and skills. It is intended for your team members, including corporate users, administrators, IT personnel, and property users who will be interacting with the Designation, Department and Skill module.

GETTING STARTED

Accessing the Module

To access the Designation, Department and Skill module, follow these steps:

1. Visit the system configuration screens.
2. Go to the system configuration module section.
3. Under the **Core Management** section, click **Designation, Department and Skill**.
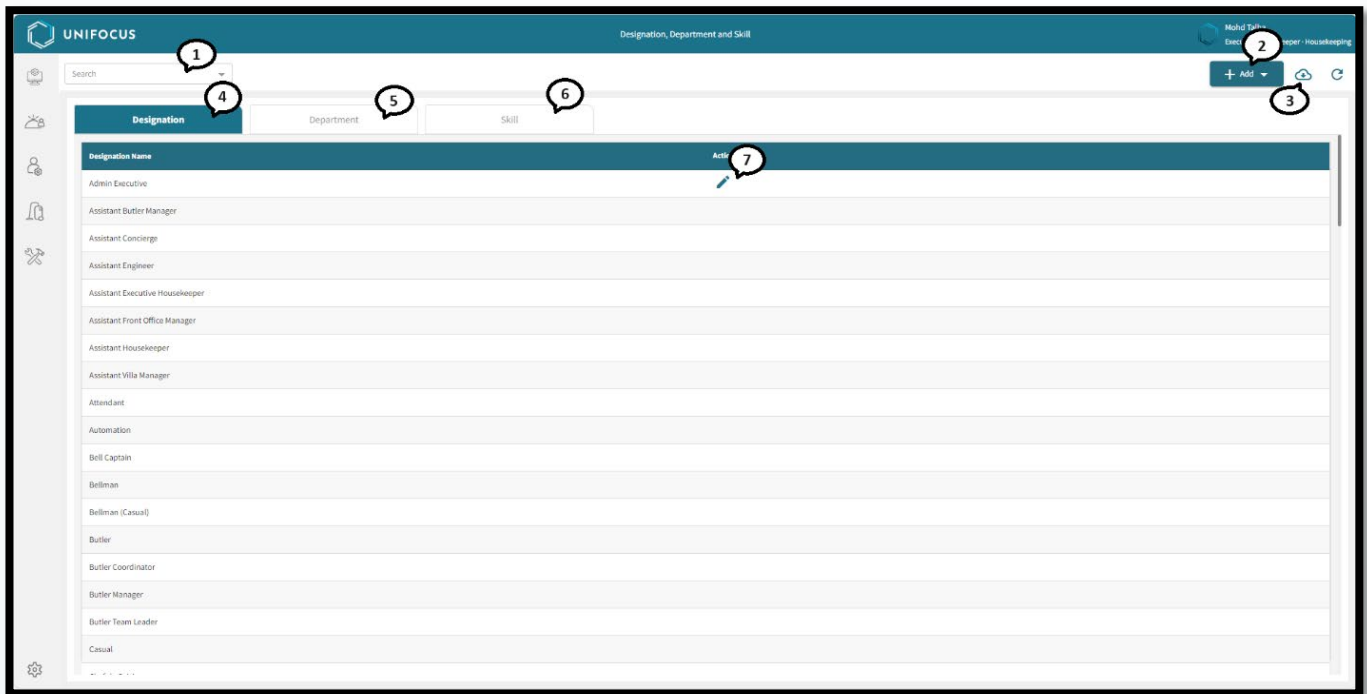
User Roles and Permissions

Ensure a clear understanding of the various user roles and their associated permissions to maintain proper access control.

Initial Setup

Complete the initial setup before using the module. This process entails configuring roles, permissions, and other essential settings.

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MAIN SCREEN OVERVIEW

New Designation, Department and Skill screen

1. **Search Functionality**: Initiate searches based on the current tab (designation, department, or skill) on the screen.

2. **Add Button**: Corporate users can add designations, departments, and skills by clicking the Add button, which opens the relevant pop-up screens.

3. **Export Icon**: Export all details available on the screen in Excel format by clicking the export icon.

4. **View and Edit Designation**: View designation details and perform edit operations on a particular designation.

5. **View and Edit Department**: View department details and perform edit operations on a particular department.

6. **View and Edit Skill**: View skill details and perform edit operations on a particular skill.

7. **Edit Icon**: Edit a particular designation, department, or skill by clicking the icon.

CORPORATE USER FUNCTIONALITY

As a Corporate User, you have exclusive access to the following functionality:

- Create and edit designations.
- Create and edit departments.

- Create and edit skills.
- Export.
- Search.

PROPERTY USER FUNCTIONALITY

As a Property User, you have access to the following functionality:

- View designations.
- View departments.
- View skills.
- Export.
- Search.

QUICK JOBS

INTRODUCTION

This release also introduces the Quick Jobs module, a powerful tool that streamlines the configuration of job descriptions by placing frequently used jobs at the top of the department list. This document outlines the release details and provides comprehensive information on its functionality.

This document targets administrators, IT personnel, and end-users who will be configuring job descriptions efficiently. It is intended for your team members, including administrators, IT personnel, and property users who will be interacting with the Quick Jobs module.

GETTING STARTED

Accessing the Module

To access the Quick Jobs module, follow these steps:

1. Visit the system configuration screens.
2. Go to the Service module section.
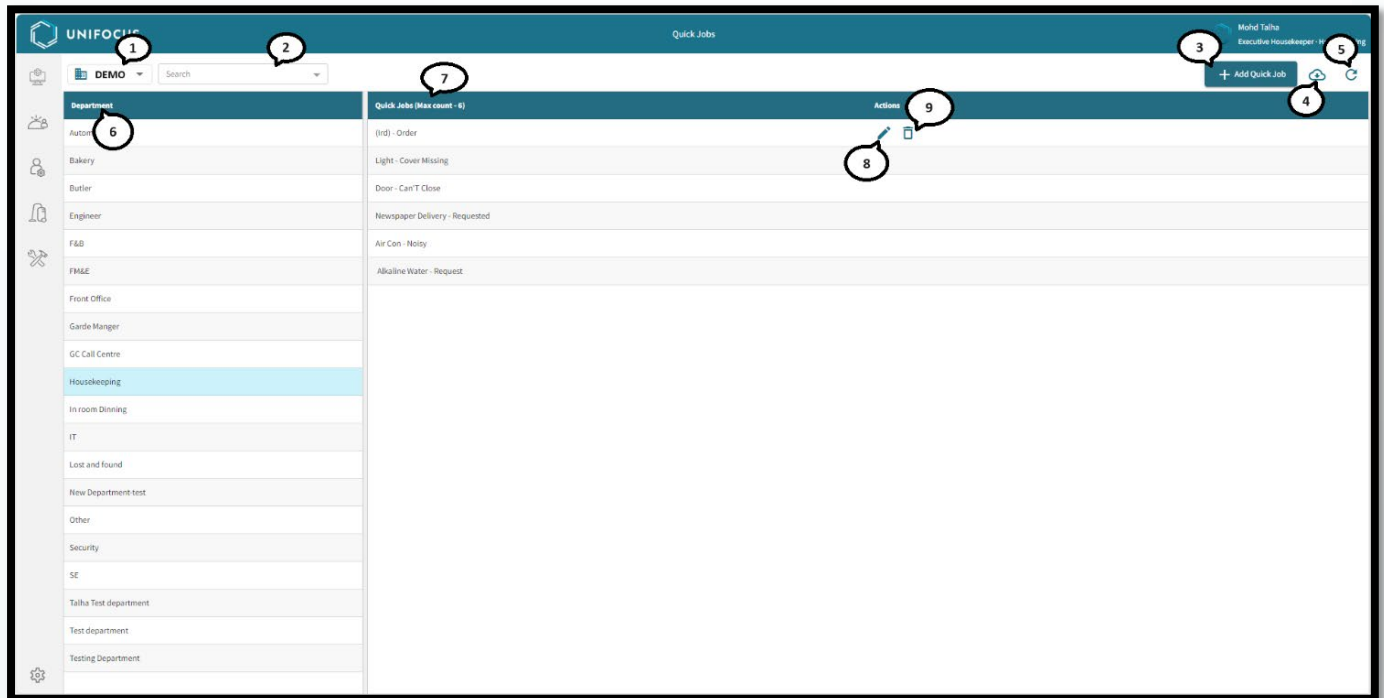3. Click the **Quick Jobs** module.

User Roles and Permissions

Ensure a clear understanding of the various user roles and their associated permissions to maintain proper access control.

Initial Setup

Complete the initial setup before using the module. This process entails configuring roles, permissions, and other essential settings.

MAIN SCREEN OVERVIEW

New Quick Jobs screen

1. **Property Selection**: View the list of accessed properties, facilitating easy switching between properties.

2. **Search Functionality**: Initiate searches based on job descriptions, displaying all departments with the searched job description as quick jobs.

3. **Add Quick Job**: Add job descriptions as quick jobs in different departments by clicking the Add button, which opens the relevant pop-up screen.

4. **Export Data**: Export all details available on the screen in Excel format by clicking the export icon.

5. **Refresh**: Update the data available on the screen by clicking the refresh icon.

6. **Department List**: View the list of departments. Clicking any department displays the associated quick jobs.

7. **Quick Jobs (Max Count - 6):** View quick jobs associated with the relevant departments. A maximum of six quick jobs can be configured per department.

8. **Edit Quick Jobs**: Edit quick job details by clicking the edit icon.

9. **Delete Quick Jobs**: Remove selected quick jobs from the relevant departments by clicking the delete icon.

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We value your input and want to hear from you! As we continue to enhance Unifocus products, we invite you to share your questions, suggestions, and feedback with us. If you have any thoughts or ideas on how we can improve our products, please don't hesitate to reach out to us at product@unifocus.com or Ideas Portal (aha.io).