

**HR Database Part 1:**

**Instructions**

*(Electronic copy of database is document HRM 3D on the CD)*

**HR Practitioner Tools**

**3C:**

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| **HR Database Instructions**  Keeping an up-to-date and accurate record of the personnel records of all active officers in the ministry, department or agency (MDA) is critical if more strategic human resources (HR) activities and planning are to be undertaken. This tool is not a substitute for keeping accurate and up-to-date personnel records to manage the legal and financial aspects of contracts of employment, but it can be a useful tool to collate and analyse information for workforce planning and capacity building.  *(Refer to the ‘Guide to Personnel Record Keeping’ document in this Resource Suite for more information and guidance on maintaining accurate, protected and reliable personnel records.)*  To assist with these activities, a simple database has been created in Microsoft Excel *(see CD for an electronic copy of this tool),* which can be used as a first step to compile the necessary information. This is a simple and non-secure tool, which can be used as a first step towards more comprehensive records. It is **not** an alternative to a formal, secure human resources management information system (HRMIS), which should be the goal of all state governments. But it will allow HR practitioners to experiment and test ideas about collating and maintaining HR information, especially for workforce planning and capacity-building purposes. The notes below provide step-by-step instructions for using the database to collate and use some basic relevant information on their officers for HR purposes.  **IMPORTANT: This spreadsheet is not a substitute for formal secure personnel records or any HRMIS based on these.**  **What the Spreadsheet Can Do:**  The spreadsheet allows the entry of a wide range of HR-relevant data for each officer. In some cases data is entered by typing in the cell. In many cells a ‘drop-down’ menu will appear, which gives a number of options to choose from. This improves the ability to filter and sort the data according to the information to be analysed. *(The drop-down menus are not exhaustive and can be customised to specific circumstances and needs. See instructions below on how to expand and edit the drop-down menus.)*  Once data has been entered for each officer, the spreadsheet can then be interrogated by sorting and filtering by each column, using the drop-down menus in the title cell of each column.  It is a good idea to create a ‘test’ version of the spreadsheet, and enter a few fictitious records to experiment with how to use the spreadsheet and see what it can do.  **Completing the HR Database Template**   1. **Opening, Saving and Updating the Spreadsheet:**  * Only one spreadsheet should be opened and updated at any one time by an approved HR officer to avoid creating multiple or partially updated records * To open the HR database double-click on the spreadsheet icon in the relevant saved and confidential drive on your computer * Note that the spreadsheet contains macros and is in the macro-enabled file format. Upon opening the file, you should receive a message saying ‘Macros Have Been Disabled’. Click on the Option button and select ‘Enable This Content’ * BEFORE DOING ANYTHING ELSE click on the Excel menu in the top left-hand corner of the window and click ‘Save As’ * Then IMMEDIATELY save the spreadsheet with the current date in the following format: MDA name, HR database, DD/MM/YYYY e.g. ‘Ministry of Education HR Database Template 02.03.2013’ * In the ‘Personnel Records – Active’ worksheet select the name of your MDA from the drop-down list in cell C2 and type the current date in cell C4 * You are now ready to update the spreadsheet.  1. **Archiving Old Spreadsheets:**   DO NOT DELETE HISTORICAL VERSIONS OF THE SPREADSHEET – these should be moved and stored in a designated and confidential archive folder.   1. **Adding Information to the Spreadsheet:**  * Personnel data should all be added in the ‘Personnel Records – Active’ worksheet * Columns that are not relevant or data that cannot feasibly be captured should be left blank (do not delete any columns) * It is important that the data stored for each officer is contained within a single row in the ‘Personnel Records – Active’ worksheet, i.e. each line should relate to one officer only * Data for the same officer should never be entered into different rows in the ‘Personnel Records – Active’ worksheet.  1. **Updating the ‘Drop-Down List’ Worksheet:**   The drop-down menus are not exhaustive and can be customised to specific circumstances and needs. The drop-down list of options should be amended/added to in the ‘Drop-Down Lists’ worksheet as follows:  **Step 1 –** Click on the ‘Drop-Down Lists’ worksheet  **Step 2 –** Identify the relevant drop-down list to be amended  **Step 3 –** Amend, add to or delete from the relevant drop-down list  **Step 4 –** Click on the ‘Update Drop-Down Lists’ macro button in cell B2 of the worksheet. The updated drop-down lists should now be reflected in the ‘Personnel Records – Active’ worksheet. If this is not the case, then the macros contained in the spreadsheet have been deactivated. To reactivate the macro, close the spreadsheet and reopen. Upon opening the file, you should receive a message saying ‘Macros Have Been Disabled’. Click on the Option button and select ‘Enable This Content’.   1. **Entering the Data: Column by Column Guidance**   **Personal Details: (Columns A–N)**  ‘Unique Staff ID Number’ – Enter here the officer’s unique staff ID number that will be used to refer to a single officer throughout his/her career in the service. This may be an Oracle number or other automatically generated number. It is important that this number relates to a single officer only and is approved for use to avoid more than one officer being assigned the same number  ‘First Name’ – Enter here the first given legal name of the officer  ‘Surname’ – Enter here the last given family name of the officer  ‘Address’ – Enter here the officer’s address  ‘Local Government Area’ (LGA) – Select the officer’s LGA from the drop-down menu  ‘Telephone Number’ – Enter here the officer’s contact details  ‘Date of Birth’ – Enter here the date of birth recorded on the officer’s approved birth certificate  ‘Nationality’ – Select the officer’s nationality from the drop-down menu  ‘State of Origin’ – Select the officer’s state of origin from the drop-down menu  ‘Gender’ – Select the officer’s gender from the drop-down menu  ‘Religion’ – Select the officer’s religion from the drop-down menu  ‘Ethnicity’ – Select the officer’s ethnicity from the drop-down menu  ‘Disability’ – Select the officer’s disability (if any) from the drop-down menu  ‘Marital Status’ – Select the officer’s marital status from the drop-down menu.  **Current Position: (Columns O–V)**  ‘Job Title’ – Select the officer’s job title from the drop-down menu  ‘MDA’ – Select the name of the officer’s MDA from the drop-down menu  ‘Department’ – Enter here the name of the officer’s current department. If the officer moves departments while working in the MDA, then the existing data should be replaced (but only once the spreadsheet has been opened and saved as outlined above)  ‘Unit’ – Enter here the name of the officer’s current unit. If the officer moves units while working in the MDA, then the existing data should be replaced (but only once the spreadsheet has been opened and saved as outlined above)  ‘Cadre’ – Select the officer’s cadre from the drop-down menu  ‘Grade Level’ – Select the officer’s grade level from the drop-down menu  ‘Manager First Name’ – Enter here the first given name of the officer’s line manager. If the officer changes line manager while working in the MDA, then the existing data should be replaced (but only once the spreadsheet has been opened and saved as outlined above)  ‘Manager Surname’ – Enter here the last given family name of the officer’s line manager. If the officer changes line manager while working in the MDA, then the existing data should be replaced (but only once the spreadsheet has been opened and saved as outlined above).  **Educational Experience: (Columns W-–Y)**  ‘Highest level of education’ – Select the officer’s highest level of education from the drop-down menu  ‘Highest qualification obtained’ – Select the officer’s highest qualification from the drop-down menu  ‘Highest professional qualification’ – Select the officer’s highest professional qualification from the drop-down menu.  **Employment History: (Columns Z-–AC)**  ‘Nature of employment’ – Select the officer’s employment type from the drop-down menu  ‘Commencement date’ – Enter here the date the officer first joined the service  ‘Confirmation date’ – Once the officer has been confirmed, enter here his or her confirmation date  ‘MDAs worked in’ – List here any other MDAs the officer has served in and ideally details of any experience gained/duty posts held.  **Career Development: (Columns AD–AG)**  ‘Date of last promotion’ – Enter here the date the officer was last promoted  ‘Eligibility date for next promotion’ – The date of last promotion, current grade level and cadre should all be used to calculate the date of the officer’s eligibility date for next promotion. That does not mean he/she should be automatically promoted at this time but the HR officer should use this information to initiate meaningful performance-based promotion discussions with the relevant line manager  ‘Last appraisal score awarded’ – Enter here the last overall appraisal score awarded  ‘Date of last appraisal score awarded’ – Enter here the date of the last appraisal score awarded.  **Training History: (Column AH)**  ‘Training courses attended and date’ – Enter here details of any training or conferences attended relevant to the officer’s current post, including the dates attended. |