PayNortheast

Administrator Guide

Advanced HR 2.0

CONTENTS

Document Revision History

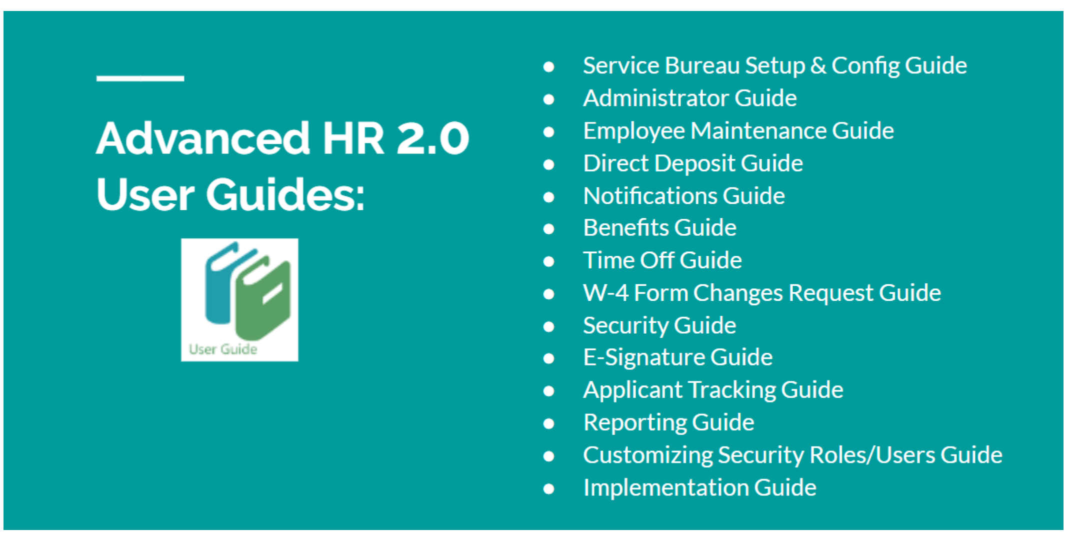
The following table lists the major updates made to this document.

Doc Version	Software Version	Date	Description
2.0	2.0	8/7/2019	Reorganized the previous *Administrator Guide* into two separate guides: • *Service Bureau Setup and Configuration Guide* (for Super Admins and Service Bureau Admins only). This guide contains mostly one-time setup and configuration tasks. • **This guide:** *Administrator Guide* for ALL Administrators; Super Admins, SB Admins, and Client Admins. This guide describes how to perform the day-to-day functions of Advanced HR for all administrators.
2.1	2.0	Oct. 2019	Updated this guide by converting most screenshots to the new user interface.

Audience and Additional Advanced HR 2.0 Documentation

The intended audience for this guide is ALL administrators: **Super Admins**, **Service Bureau Admins** AND the **client administrators**. It contains information about **how to perform the day-to-day maintenance administrative tasks** for Advanced HR 2.0. It does not contain the mostly one-time set up and configuration information about tasks performed by the Service Bureau.

The following is a list of all the Advanced HR 2.0 User Guides; all are available on the **Evolution Resource Center** for online viewing and/or for downloading.



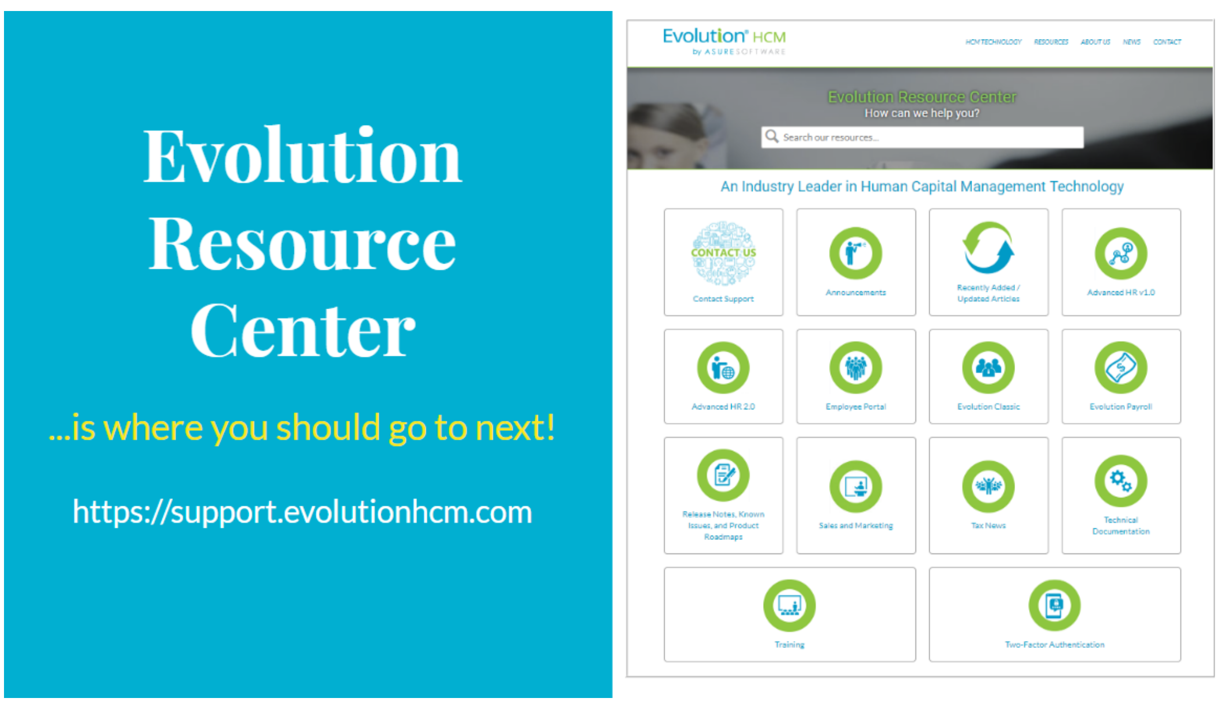
Employee end users should refer to the separate document *Getting Started: Employee End User Guide* which describes Advanced HR 2.0 from the employee user point of view. This is the recommended resource for your service bureau's client end users to start with.

Evolution Resource Center

You can go to the Evolution Resource Center at https://support.evolutionhcm.com to view the latest Advanced HR 2.0:

- Release Notes
- Training Guides
- User Manuals
- Instructional Videos
- Implementation Center materials

Your comments are important to us. You can enter your feedback directly online for any specific articles/topics in the **Evolution Resource Center**. We encourage you to tell us what you like, or what you would like changed about Evolution documentation and training materials. We are committed to continually improving our product documentation for you.



Evolution Resource Center

You can also:

Email the Evolution HCM Support Department for questions:

support@evolutionhcm.com or by calling 802-655-8347

Email the Evolution HCM Training Department to schedule a training:

Training@evolutionhcm.com

Email the Evolution HCM Implementations Team:

AHR_implementations@asuresoftware.com

Advanced HR 2.0 Administrator Guide

This User Guide is intended for ALL administrators: Super Admin, Service Bureau administrators, AND for the client administrators. It describes **how to perform the daily ongoing administrative functions** of Advanced HR 2.0. It does not contain the mostly one-time setup and configuration task information which is performed by the service bureau. Service Bureau Admins should refer to the separate *Setup & Configuration Guide*.

Getting Started

This section of the guide discusses some of the basics, getting-started topics of Advanced HR such as:

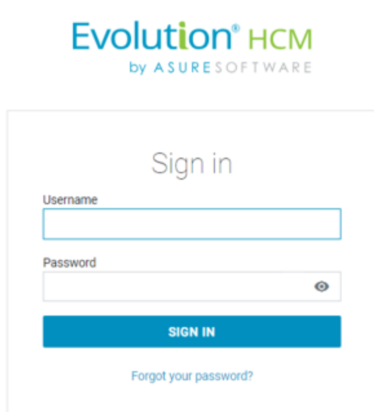
- Signing in and out of Advanced HR
- The company Dashboard
- Searching for companies, employees, and other basic information
- Using the HR Admin tab screen

Signing into Advanced HR 2.0

Advanced HR 2.0 requires all users to have a unique username and a password. For Advanced HR and Evolution Payroll, we have implemented a Single Sign On feature, or SSO, to allow users to experience greater ease and functionality. The SSO feature, however, requires some initial setup:

- The Username and Password for Evolution Payroll and Advanced HR 2.0 must match.
- The Username must be a valid, unique email address. You update user email addresses in the **Admin - Security - Users - Details** tab in Evolution Classic.
- The SSO feature must be activated by the Evolution IT department to function for your service bureau.

When the user goes to either Evolution Payroll or Advanced HR 2.0, they will be automatically redirected to the SSO **Sign In** page.



To access either Advanced HR 2.0 or Evolution Payroll, if applicable, the user is taken to the SSO Sign In screen.

Using their Evolution credentials they'll be able to sign in and access both systems.

Once they sign in successfully, users with the appropriate security can easily switch between Advanced HR 2.0 and Evolution Payroll.

Usernames

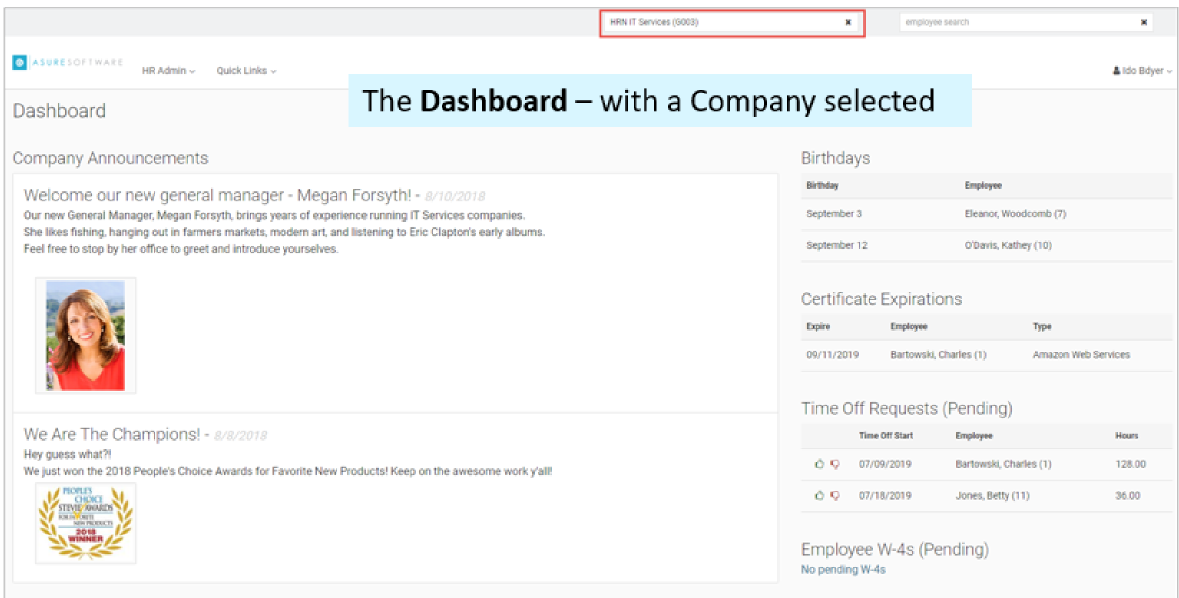
In order to use Advanced HR 2.0, all employees must have an email address which serves as the **username**. This ensures that all users have a unique username and can receive email communication through Advanced HR 2.0.

Passwords

Passwords for Advanced HR 2.0 must include at least one number, one non-alphanumeric special character, one uppercase character, and contain between 10 and 30 characters.

The Dashboard

After entering their credentials, the user is taken to their Company **Dashboard**.



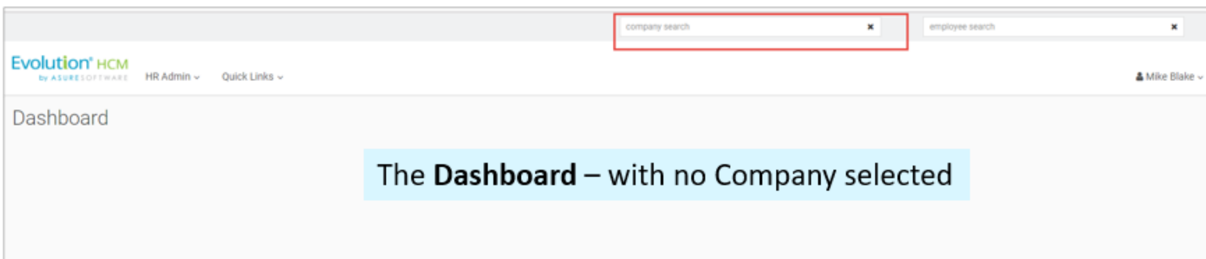
The Dashboard is a place for employees to view:

- Company announcements
- Birthdays and Employee Anniversaries
- Important dates and expirations
- Their time off balances and request history
- Links to various items such as employee benefit plans, company documents and other publications
- Upcoming reviews

The Dashboard is a place for employees to view:

- Any expiring certification and license reminders
- Any pending employee W-4 Form change requests

The following is an example of the Dashboard that displays when no company is selected. The "**No Company Selected**" message displays in the upper right of the screen.



The specific look of the Dashboard will vary depending on the company and the user's assigned level of access (security level).

For example, a **Base User** (which is the lowest user role) has the ability to see the following, if configured to do so:

- Company announcements
- Time off balances and requests
- Upcoming Review dates, with corresponding Acknowledgements
- Upcoming Training Classes, with corresponding Acknowledgements
- The user's expiring Certifications and Licenses, with corresponding Acknowledgements

The **Base Admin** User and **Base Manager** User has the ability to see the following, if configured to do so:

- Company announcements
- Time off balances and requests

Time Off Requests (Pending)

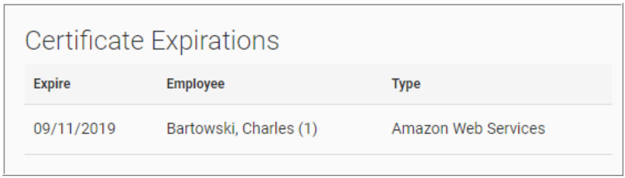
	Time Off Start	Employee	Hours
	07/09/2019	Bartowski, Charles (1)	128.00
	07/18/2019	Jones, Betty (11)	36.00

- Upcoming employee Birthdays and Anniversaries

Birthdays

Birthday	Employee
September 3	Eleanor, Woodcomb (7)
September 12	O'Davis, Kathey (10)

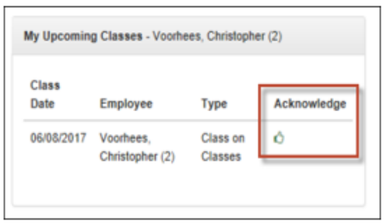
- Employee Certificate and License Expirations


Certificate Expirations

Expire	Employee	Type
09/11/2019	Bartowski, Charles (1)	Amazon Web Services

- Employee Scheduled Reviews, pending time off requests, and pending W-4 Form changes
- Acknowledgments

Other functionality (set on the **Home Dashboard Setup** screen) that is important to make note of, is **Acknowledgements** for **Base Managers** and **Base Admins.**


My Upcoming Classes - Voorhees, Christopher (2)

Class Date	Employee	Type	Acknowledge
06/08/2017	Voorhees, Christopher (2)	Class on Classes	

An **Acknowledge** icon displays on the Admin or Manager's Dashboard that when clicked, generates an email to the user and optionally to their supervisor or other specific acknowledgement list.

Once a class, license renewal, or upcoming review is acknowledged by the employee, the Acknowledge icon will no longer display on the Dashboard.

Base Managers, with regards to employee Birthdays and Anniversaries, Certificate and License Expirations, Scheduled Reviews, and W-4 Form change requests can only view the employees that are assigned to them. However, **Base Admins** will see these items for *all* employees in the company.

Acknowledgements allow the user to:

- Create Notifications for supervisors when an employee acknowledges a review.
- Note that you can Add Users to the Acknowledgements by including them in the Notifications chain. Refer to the Notifications section later in this guide.

When the Dashboard settings for the Base Users, Base Managers, and Base Admins have been set, when those users sign in to Advanced HR, they will be taken to their appropriate Dashboard view.

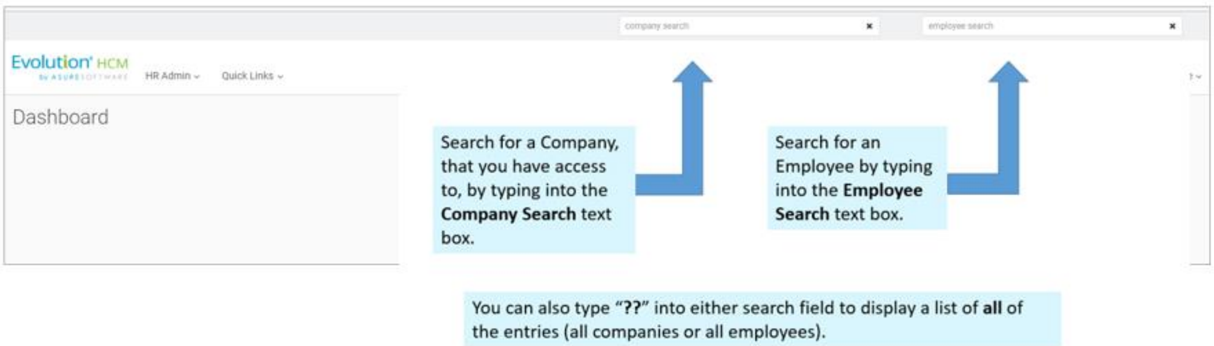
Note: System Administrators configure how the Dashboard appears to users on the **HR Admin – Company – Home Dashboard Setup** screen. Refer to the Home Dashboard Setup section of this document to learn how to configure the Dashboard.

Searching for Information

Let's discuss how you search for information in Advanced HR 2.0, for companies, employees, and filter for other kinds of information.

Company and Employee Searching

At the top of every screen in Advanced HR is a **Company** search box and an **Employee** search box.

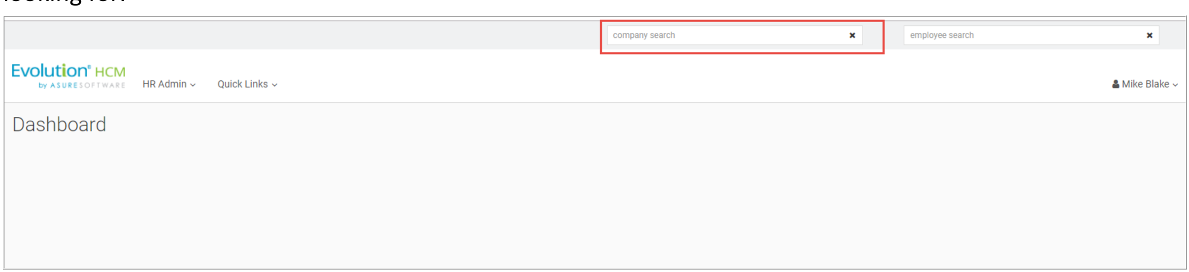


Using the Company and Employee search boxes

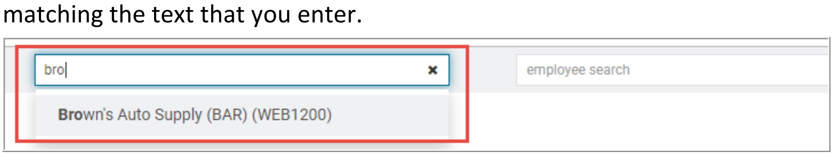
Searching for a Company

By entering text:

1. At the top of the screen, in the **company search** text box, start typing the name of the company you are looking for.



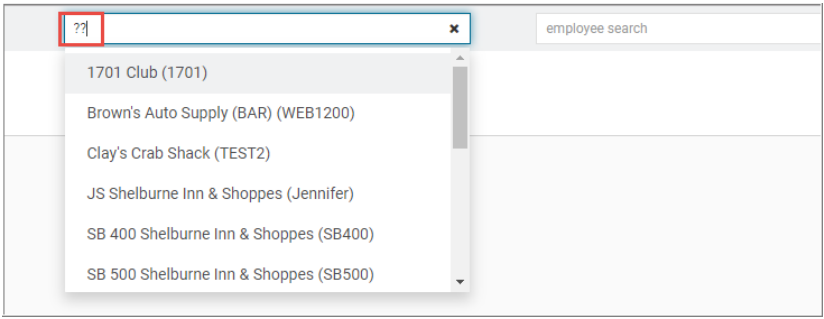
2. As you enter at least the first two characters, the system shows a list of company names in the dropdown matching the text that you enter.



3. Select the company name in the dropdown that you are looking for.

By entering a double question mark:

1. At the top of the screen, in the **company search** text box, enter two questions marks (**??**).

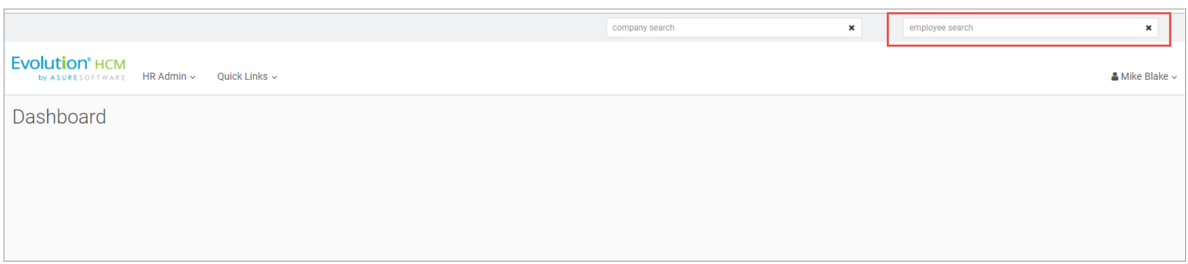


2. The system displays a dropdown list of all the company names.
3. Select the company name from the dropdown that you are looking for.

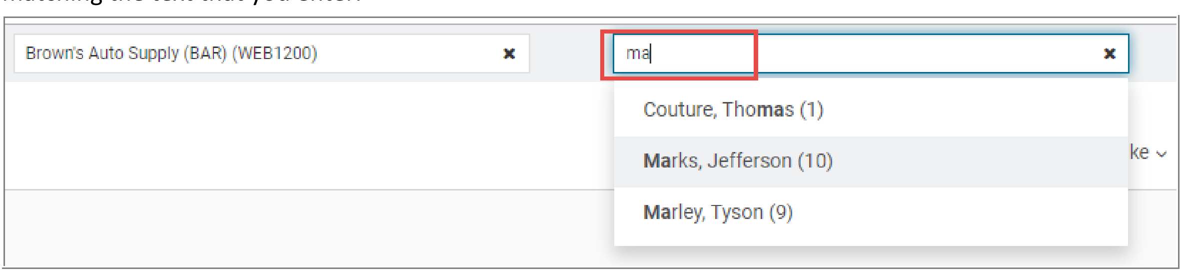
Searching for an Employee

By entering text:

1. At the top of the screen, in the **employee search** text box, start typing the name of the employee you are looking for.



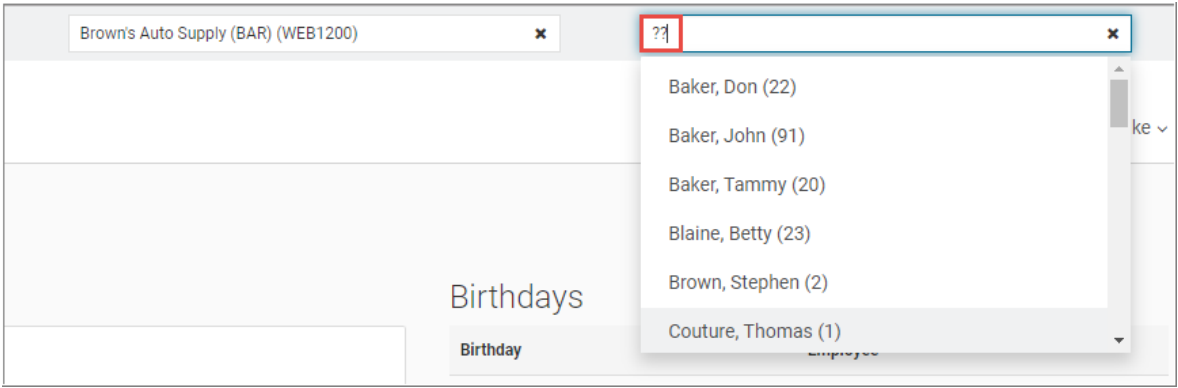
2. As you enter at least the first two characters, the system shows a list of employee names in the dropdown matching the text that you enter.



3. Select the employee name from the dropdown that you are looking for.

By entering a double question mark:

1. At the top of the screen, in the **employee search** text box, enter two questions marks (**??**).
2. The system displays a dropdown list of all the employee names.



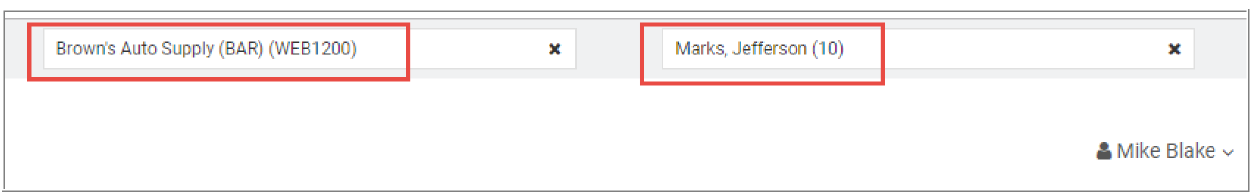
3. Select the employee name from the dropdown that you are looking for.

Note: The employee search will not search on a first AND last name; only the first name or the last name or the employee number.

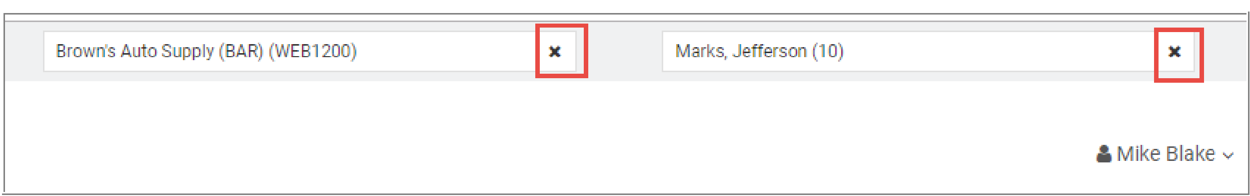
Locking Down a Company / Employee

Once you select an employee and/or company, Advanced HR will lock the selections (company / employee) until you change them. This action is referred to as "**locking down a company**" or "**locking on an employee**."

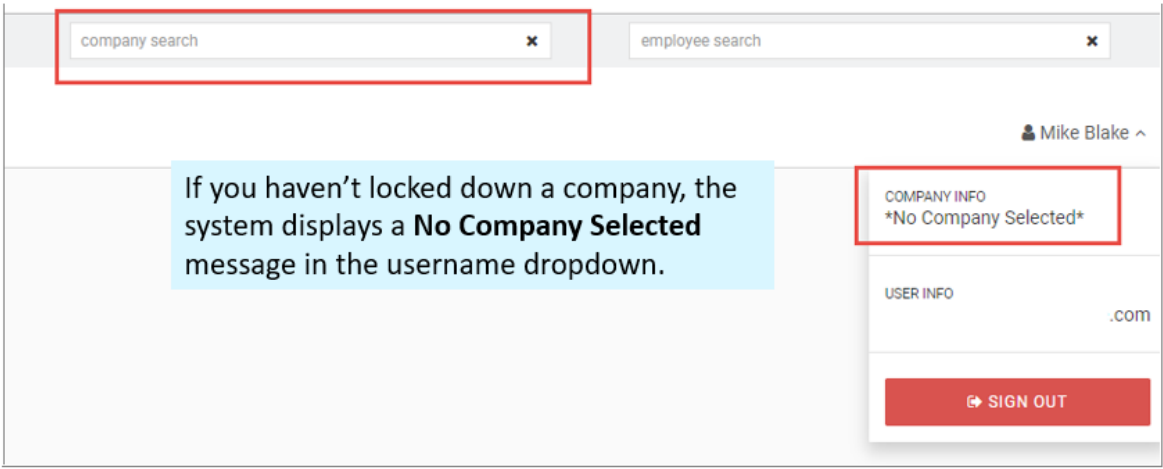
For example, in the following screenshot the user is locked down on the **Brown's Auto Supply** company and locked down on the employee **Jefferson Marks**.



You can "unlock" a company or an employee by clicking the "**x**" on the right side of the company and /or employee search field.



It's important to always lock into a company (and an employee if required) before attempting to perform a task.



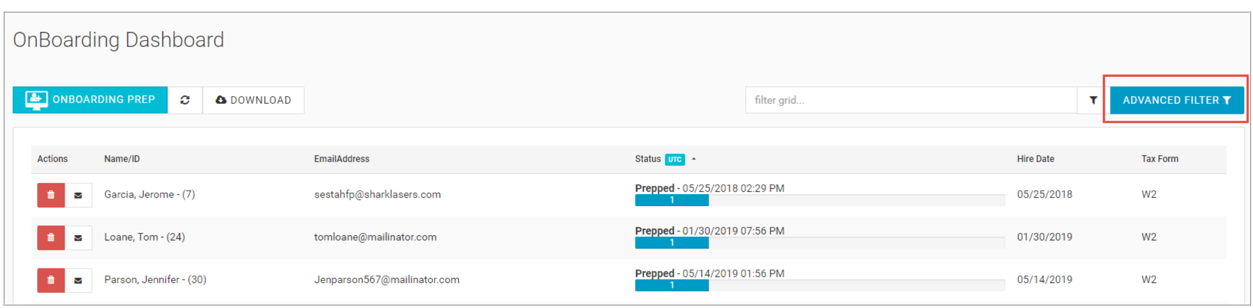
Searching for Employees Hired through the Onboarding Process

After a new hire has been approved and onboarded to Advanced HR 2.0 through the Self-Service Onboarding process, their onboarding information can be found in the **Onboarding Dashboard** by using the **Advanced Filter** button.

Using the **Advanced Filter** button may be useful if you have been having difficulty locating either employees going through the onboarding process and/or those employees whose onboarding has been approved and who have been onboarded.

To display a list of employees hired through the onboarding process in Advanced HR 2.0:

1. Go to **HR Admin – Onboarding – Onboarding Dashboard**. You must be an Admin, Manager, or SB Admin.
2. The system displays the **Onboarding Dashboard** showing a list of the employees currently going through the various stages of the onboarding process.

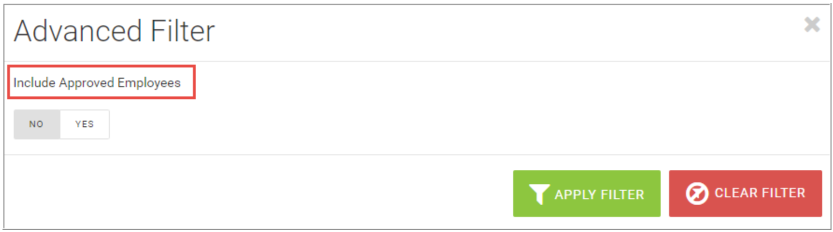


If you are locked into a company, the system lists only employees from that company, shown above. If you are not locked down on a company, the list includes onboarded employees from all companies.

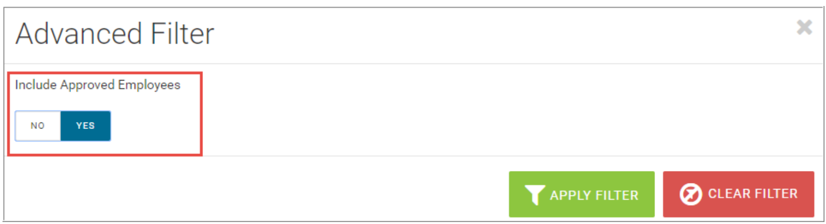
3. Still don't see the onboarded employees you are looking for?
4. You can use the **Advanced Filter** button 

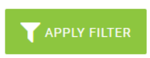
on the **Onboarding Dashboard** to expand the list of employees the system displays to show all the employees waiting to be onboarded AND, all the employees who were onboarded via the onboarding process. Do the following:

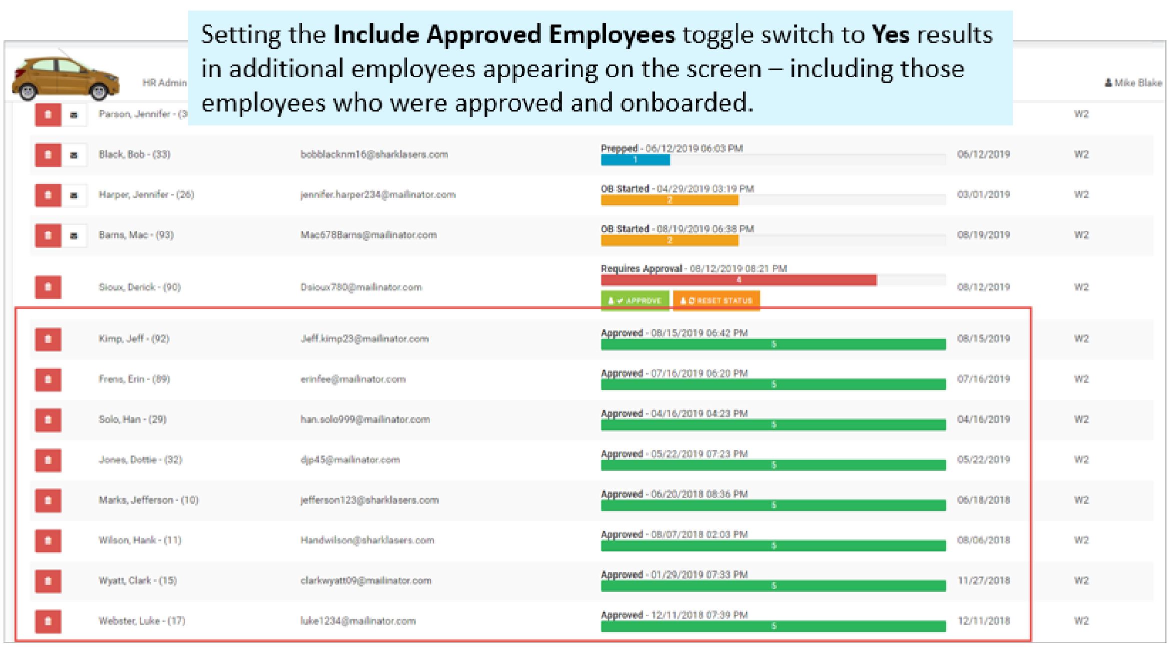
5. Click on the **Advanced Filter** button. The system displays the **Advanced Filter** popup screen, shown below.



6. You can use the **Include Approved Employees** toggle switch option as follows:
   - **No** – which is the default setting – will cause the displayed list to *contain only those employees currently going through the onboarding process*.
   - What you can also do is change the **Include Approved Employees** toggle switch to **Yes** in order to also include *all* the employees waiting to be onboarded and *all* the employees who were onboarded via the onboarding process.

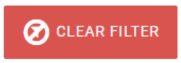


7. Click the **Apply Filter**  button. The system displays the results. See the screenshot below.



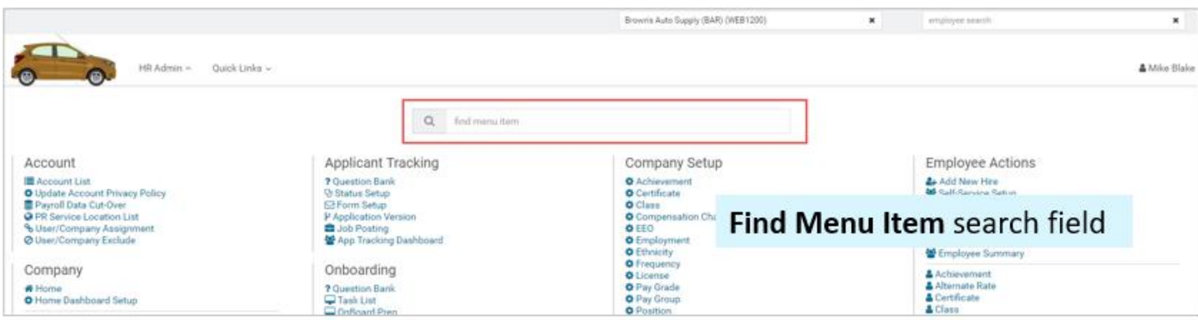
8. You can click on an approved employee record on the **Onboarding Dashboard** and view the employee's onboarding information in detail. This could include the onboarding documents, if they were available during the onboarding process.

Note: An important item to be aware of about the Advanced Filter is that it is referred to as "*Sticky*." This means that if you activate the Advanced Filter by applying some settings, then for a certain time period after you set the filter, the system will apply your filter settings to the list of employees it displays in the screen grid. To inactivate ("unstick") the filter, clear the settings on the Advanced Filter screen by clicking the **Clear Filter** button.

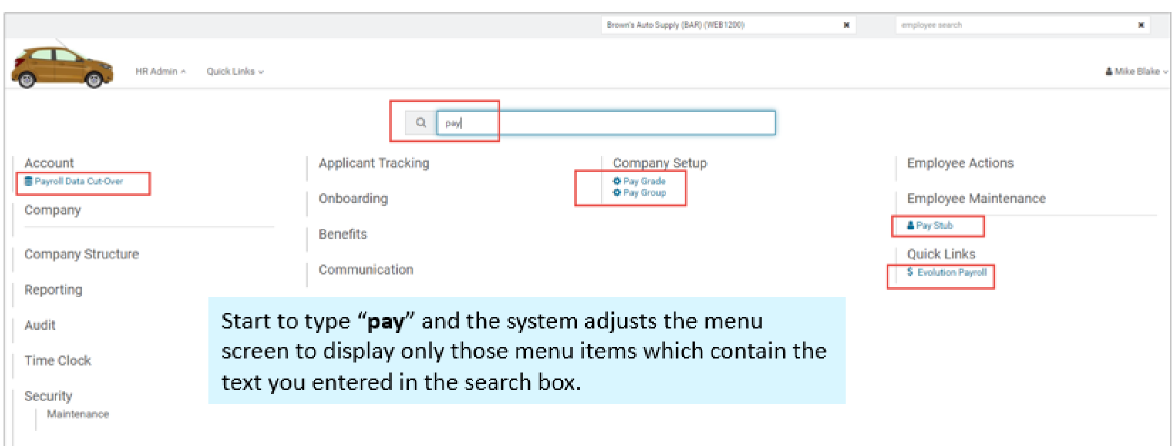


Find Menu Item Filter

At the top of every Menu tab screen, there is a **Find Menu Item** filter. This filter allows the user to start typing a word and Advanced HR will remove all of the menu items that do not apply. For example, on the **HR Admin** screen.



In the example below, we start to type the word "pay". Advanced HR then displays only the menu items that have "pay" in the title, considerably reducing the number of menu items displayed.

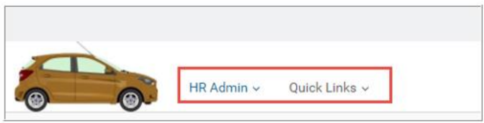


To return to a display of the full **HR Admin** menu, delete the text in the find menu item search field.

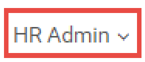
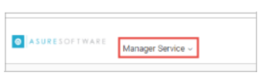
Module Links on the Dashboard

Located just above the **Dashboard**, there are links to different modules or segments of Advanced HR 2.0. The specific links that display vary by the user's assigned level of security role access which is set by the system administrator.

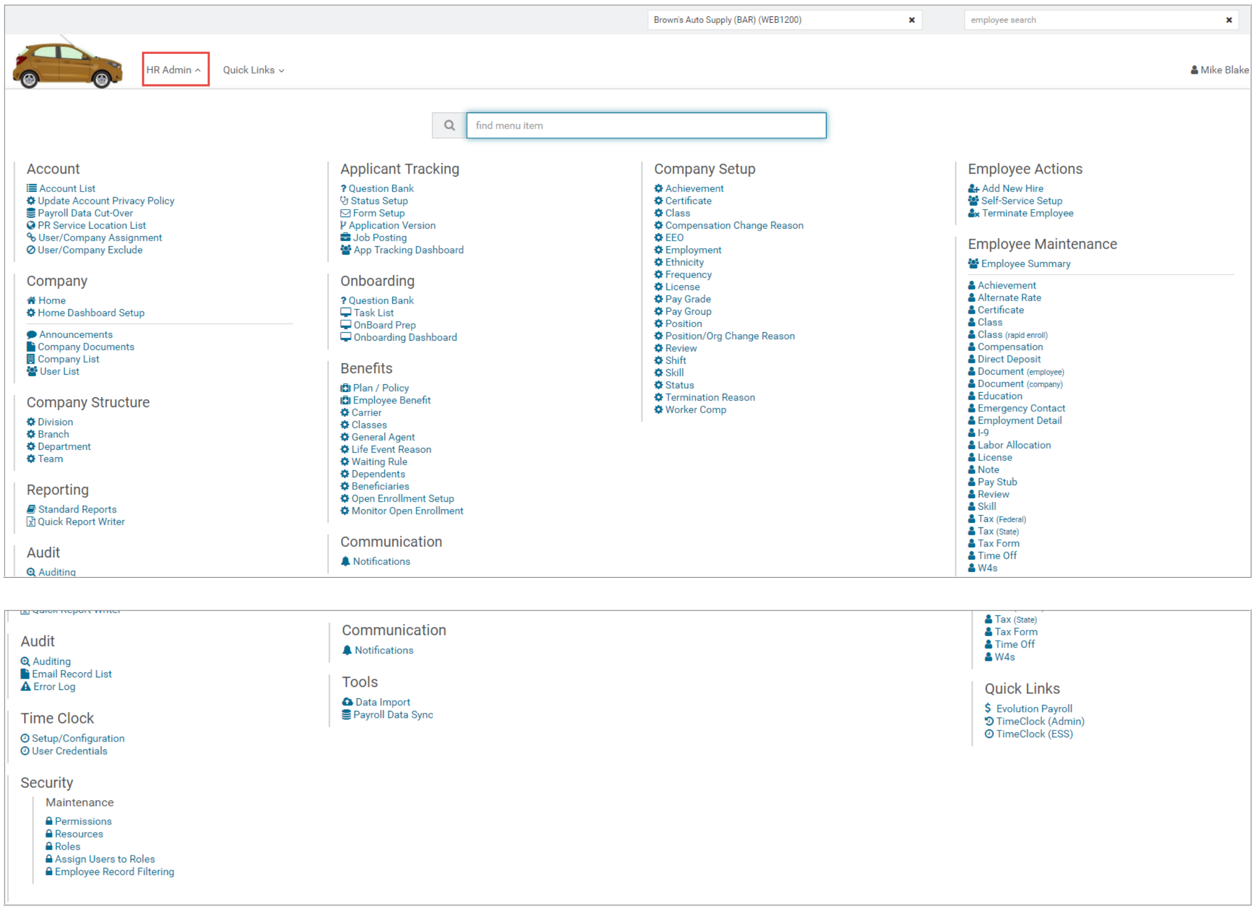
Module links on the user's Dashboard will vary by the user's assigned role



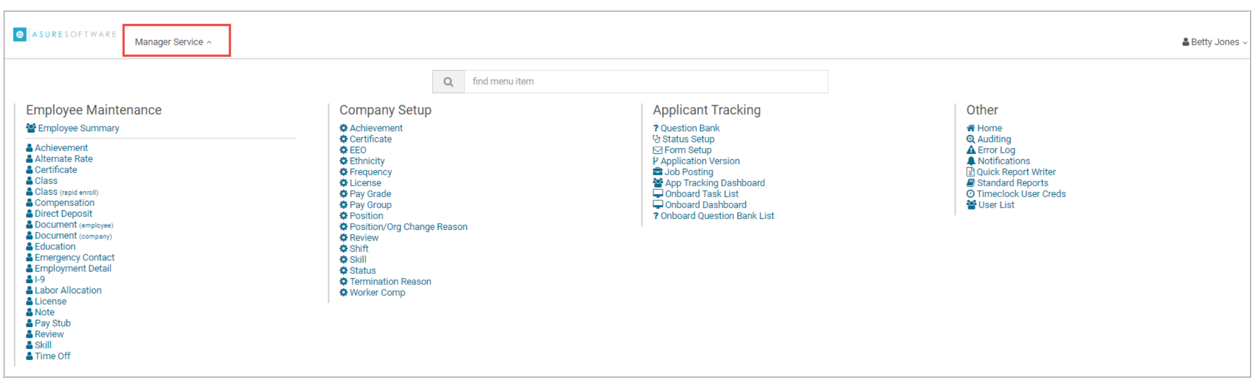
The above screenshot and the following table describes ALL of the potential **Dashboard** screen module links that may display, depending on the user's role. The specific user's **Dashboard** links will probably have only one or two of these tabs.

Module Name	Tab on the Screen	Description
HR Admin		Displays the **HR Admin** module sub-menu options where system administrators can set up and configure the system and end user options of Advanced HR 2.0.
My HR		Displays the Advanced HR 2.0 Employee Self Service module sub-menu options where employee users can access all of their HR and payroll data. **Note:** Manager role users have a unique **Manager Services** link, see below.
Quick Links		Displays a dropdown menu for frequently-used options such as **Add New Hire**, **Terminate Employee**; they are specific for the user's assigned level of access.
Manager Service		Displays the **Manager Service** menu screen for tasks associated with the Manager user role – the menu categories are: **Employee Maintenance**, **Company Setup**, **Applicant Tracking**, and **Other**.

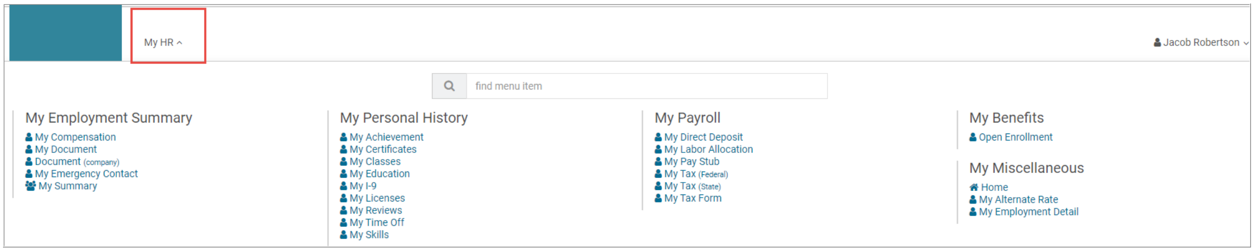
After clicking on one of the module links such as **HR Admin**, you will be presented with a sub-menu of available options. A sample **HR Admin** module sub-menu, a sample **Manager Service** sub-menu, and a sample **My HR** menu are shown in the following examples. Note the different options on each menu.



HR Admin Menu Screen

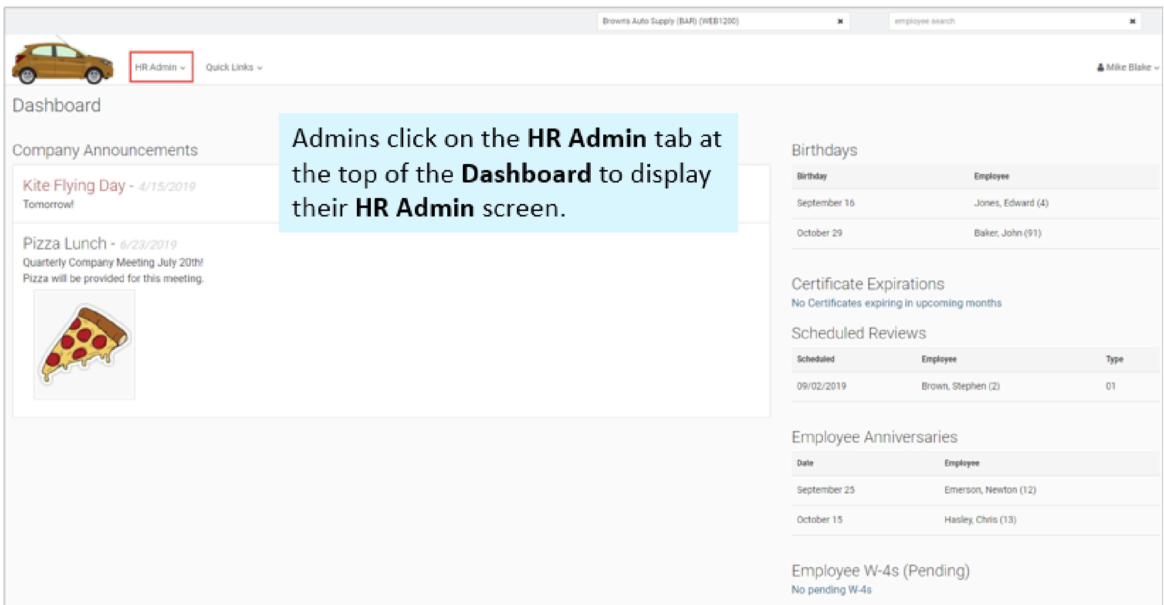


Manager Service Menu Screen



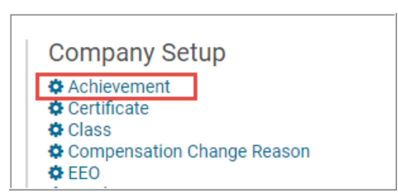
My HR Menu screen for a Base User employee

Using the HR Admin Screens Overview



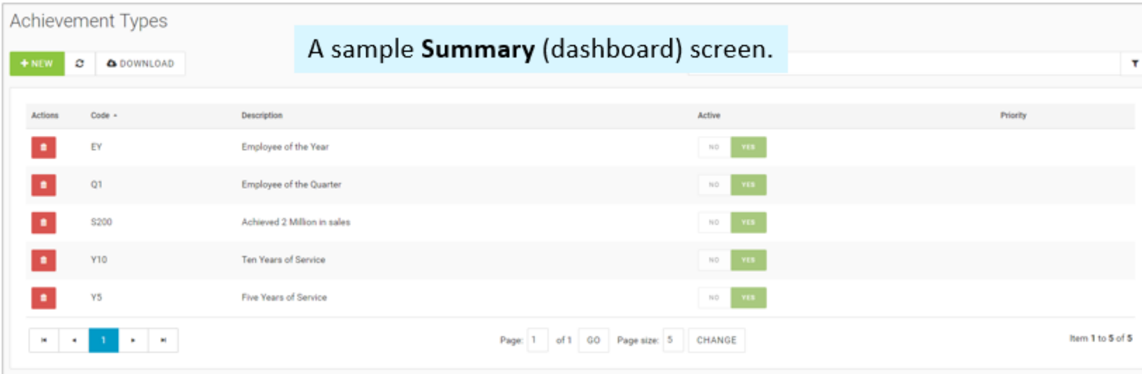
Summary and Detail Screens

Once you click on a specific **HR Admin** menu screen option, for example, **Company Setup - Achievement**, you will be presented with a summary screen of all data within that option.



Summary Screen

In the following screenshot, you see that this company has set up multiple Achievement Types.

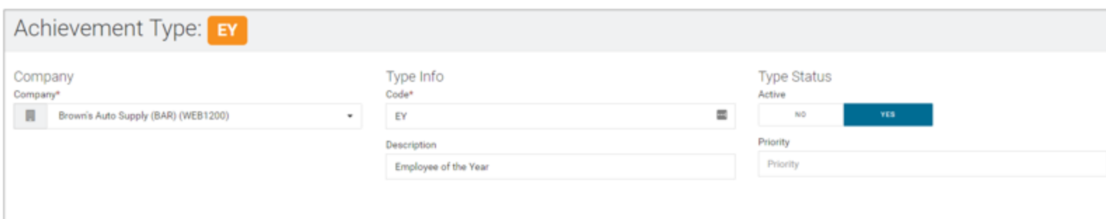


A sample **Summary** (dashboard) screen.

Details Screen

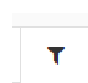
To see more detail, simply click on the specific line item (row) in the grid that you are interested in and the system displays the details screen for that item. For example, the following screenshot shows the details of the Employee of the Year Achievement Type (EY).

A sample **Details** screen.

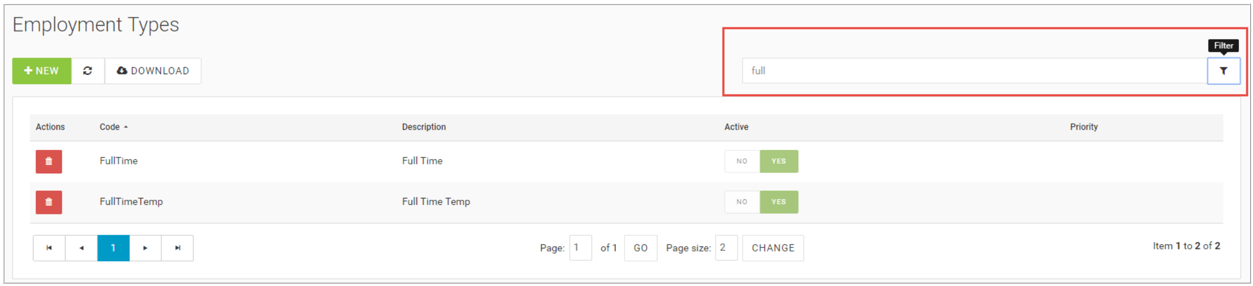


The **Prev Record** and **Next Record** buttons at the bottom of the screen allow you to quickly scroll through all available records.

Summary screens, similar to Menu tab screens, also have a filtering feature; however, to activate the filter you must either press the **Enter** key or click the search filter icon (shown at right) to initiate the search.



For example, on the **Employee Types** summary screen shown below, which has many entries, you can narrow the list by entering "**full**" in the filter grid and clicking the Filter icon.

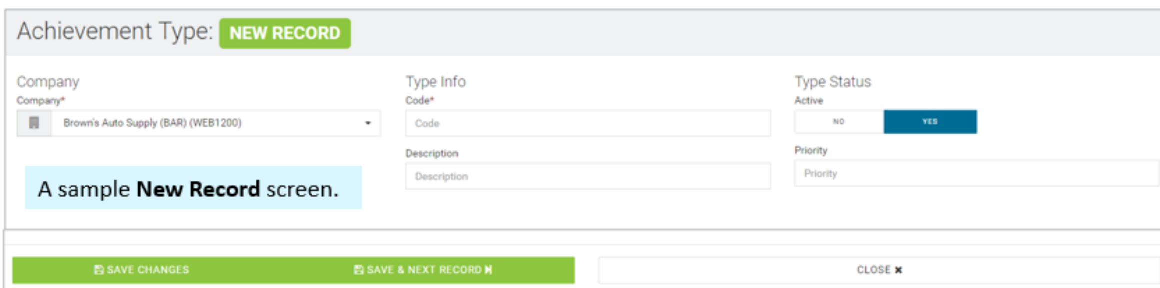


The system then narrows the results on the screen to display only those with “full”.

You can enter multiple criteria by connecting each criteria with a plus sign (**+**), for example (**Agent+Registration**). Note that when filtering with multiple criteria you are initiating an “and” search not an “or” search. In the following example you can see that the only Achievement Type record returned contains both criteria (“Agent” and “Registration”) .

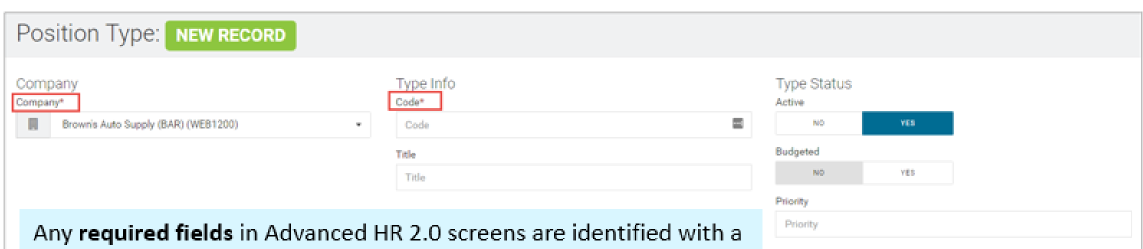
Adding and Changing Information

Some of the **HR Admin** menu screens allow you to quickly add new records with the green **+ New** button shown at left. Clicking on the **+ New** button will open a data entry screen.



A sample **New Record** screen.

Required Fields

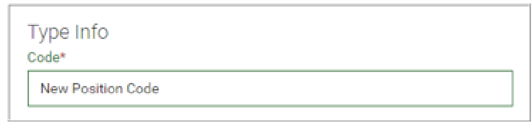


Any **required fields** in Advanced HR 2.0 screens are identified with a red asterisk at the end of the field label.

The **Company** and **Code** fields above are samples of required fields.

Completed Fields

Throughout Advanced HR, when you complete a field correctly, the system changes the field label and outline to the color **green** as shown at right.



Save Changes and Save & Next Record

Don't forget to click the **Save Changes** button as Advanced HR 2.0 will not warn you if changes have not been saved! However, Advanced HR will let you know if you forgot to complete a required field when you try and save the changes.

If you are making changes to many records, you can use the **Save & Next Record** button (shown at right) to quickly move through all records.

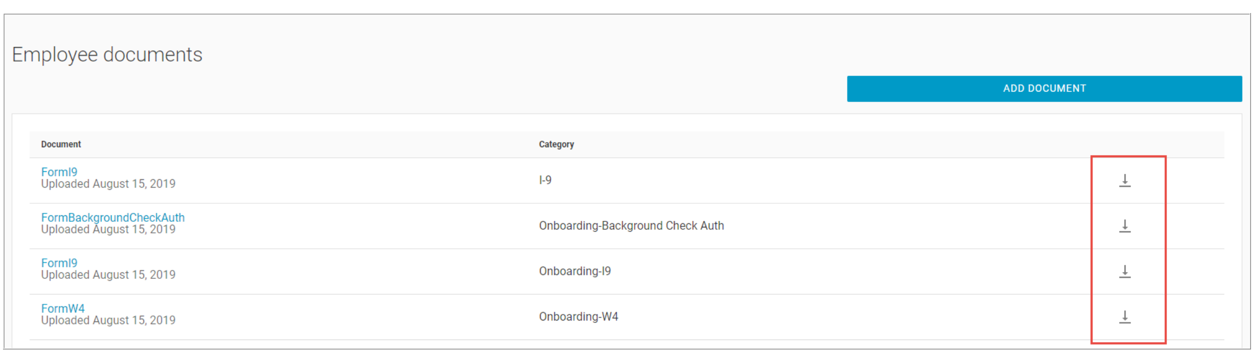
Downloading Data

The DOWNLOAD link allows you to download a summary of the information presented on a screen in Advanced HR 2.0. Downloaded data will be presented in a basic Excel document.

Certificate Code	Certificate Description
CPR	CPR Certification
SALES1	Passed Begining Sales Training
SALES1	Passed Begining Sales Training
SALES3	Passed Advanced Sales Training

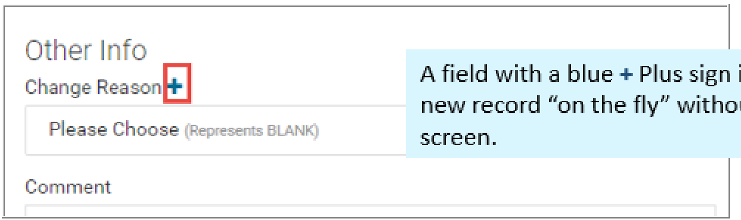
Note: If you do not see the downloaded data, make sure in your Browser settings, the pop up blocker is disabled. Note that the specific name of this setting will vary by Browser.

With the **My Documents** and **Employee Documents** screens, you can also download all documents or download the actual document by clicking on the download icon.



Adding a Record on the Fly

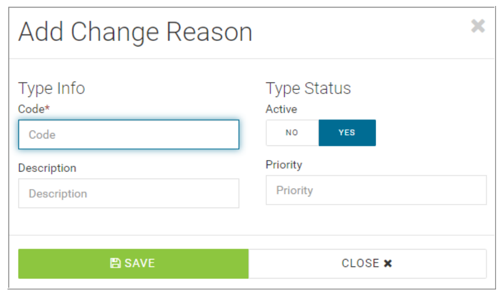
Some fields of Advanced HR 2.0 have a blue 'plus' sign (+) next to the field name. This means that you can add a new record to the dropdown "on the fly" and immediately apply the record you added.



A field with a blue + Plus sign indicates that you can add a new record "on the fly" without leaving the current screen.

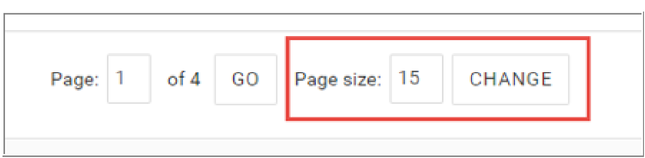
For example, if you click on the blue + sign next to the **Pay Type** field shown above, the system displays the **Add Pay Type** screen shown at right, which lets you add a new **Pay Type** field value on the fly and apply it while you are in the process of adding a new employee.

The advantage to using this feature is that you don't have to stop and display a different back-end type screen to add the new value to the system and then return to the screen where you then select that value you just added.



Changing the Record Length of a Page

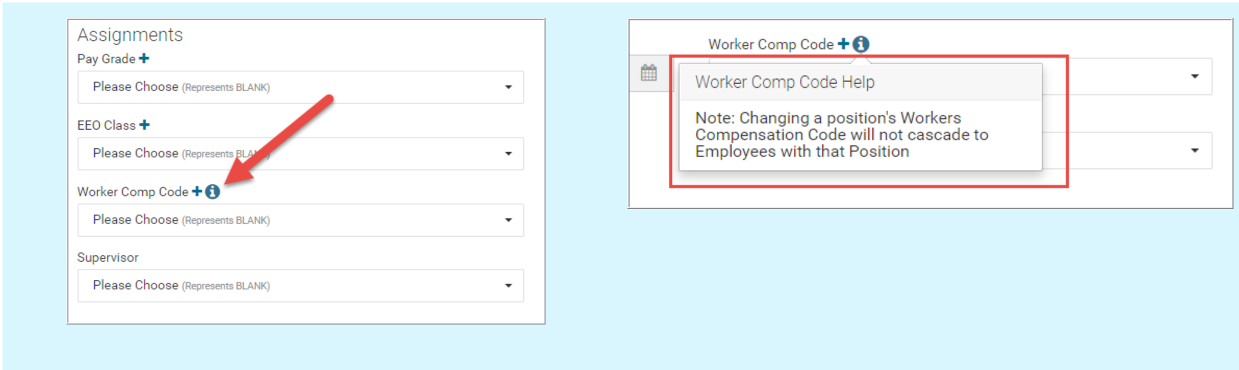
Summary screen lists may have an option to change the page record length at the bottom of the screen. Simply modify the **Page size** field value and click the **Change** button in order to show more or less number of records per page. This is useful for those screens that have a long list of possible values from which to select.



You can change the record length of a page with the **Page Size** field at the bottom of the screen.

Information Icons

Some fields in Advanced HR 2.0 have information icons next to them – a blue circle with an "**i**", see the following example on the **Worker Comp Code** field. When you hover the cursor over a field with an information icon, the cursor displays a question mark near the arrow. You can click on the information icon to learn how to use that field.

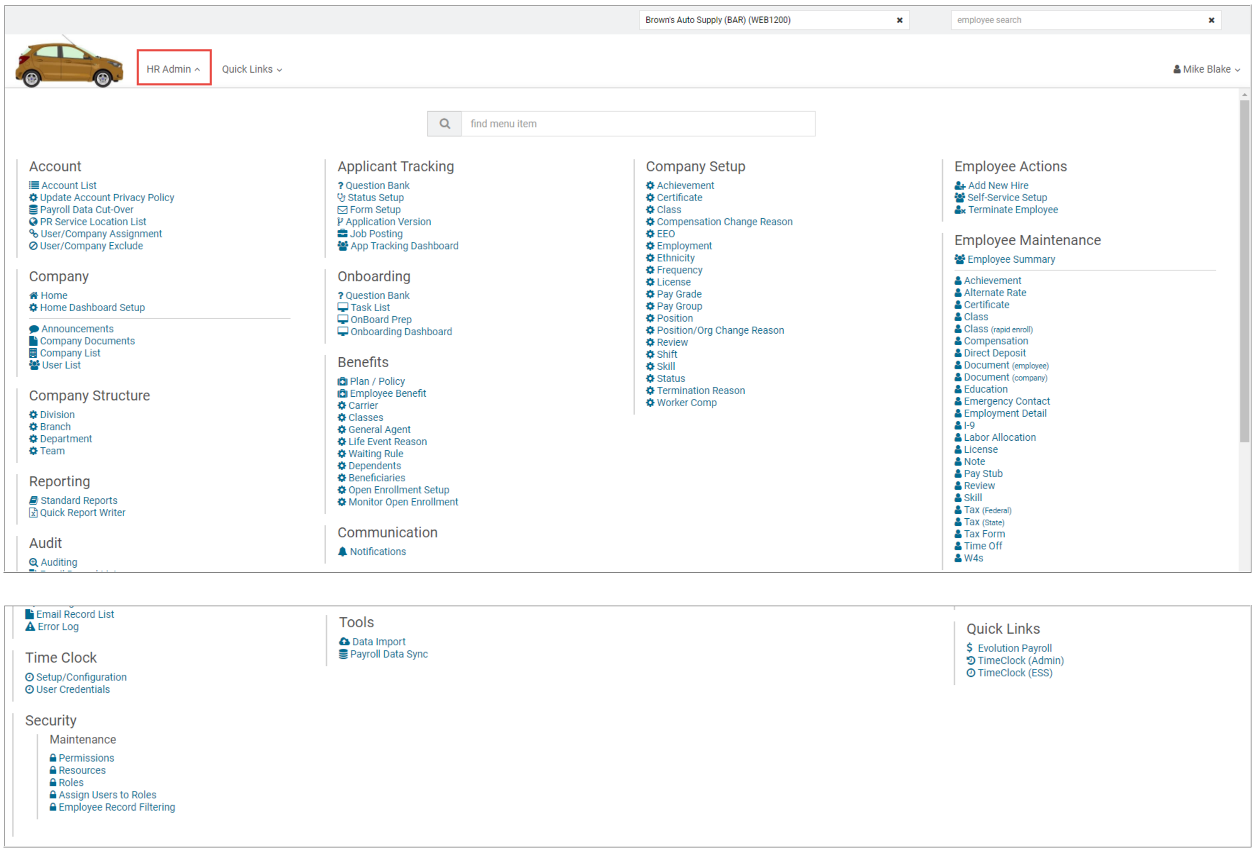


Once you read the help information, click on the information icon again to hide the help text and complete the field.

HR Admin Menu Items - Detailed Descriptions

This section describes how to use the HR Admin menu items for the day-to-day tasks of maintaining Advanced HR. It is designed **for ALL Admins**. The setup and configuration HR Admin menu items (mostly one-time tasks) have been split out from this guide and are located in the new *Service Bureau Setup and Configuration Guide*, which is designed for **Service Bureau and Super Admins only**.

Here is a full screenshot example of the **HR Admin** tab.



HR Admin menu

Note: Employee end users should refer to the separate document *Advanced HR 2.0 Getting Started Employee End User Guide* to see how the HR Admin screens configured by the administrator present from the employee point of view. The Getting Started Employee End User Guide does not contain the configuration and setup information described in this guide.

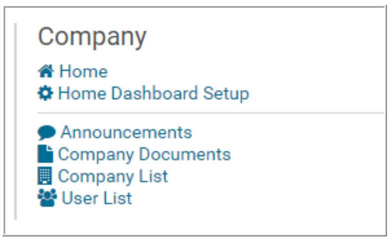
Also note that the screens contained in the **Employee Maintenance** sub menu of **HR Admin** are mostly discussed in the separate *Advanced HR 2.0 Employee Maintenance Guide*. You can download these guides on the Evolution Resolution Center.

Account Menu

For information about the HR Admin – **Account** menu, see the *Advanced HR 2.0 – Setup and Configuration Guide*.

Company Menu

The **Company** sub-menu on the **HR Admin** page lets you select from the following menu items:



Once the company has been onboarded to Advanced HR 2.0, there is some setup that is required. The company setup is done in two locations:

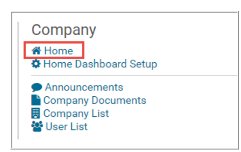
- **HR Admin - Company** pane – this is discussed below
- **HR Admin - Company Setup** pane – this setup is discussed in the Company Setup section of this document

HR Admin – Company pane

Let's first look at the **HR Admin - Company** pane. It is here that the user can set up the Company Dashboard of Advanced HR 2.0. Each menu item of the **HR Admin – Company** pane is described below.

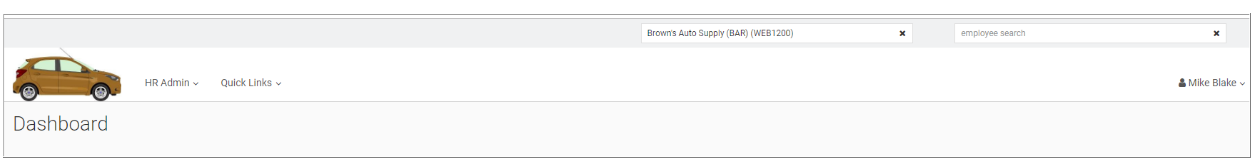
Home

You can click the **Home** item on the **HR Admin** – **Company** menu as another method to go directly to the company Dashboard.



Company Dashboard

Before we discuss how Admins set up the Company Dashboard, let's first discuss what the Dashboard is. The **Company Dashboard** is what the users see when they first sign in to Advanced HR 2.0. When signed in as a **Base Admin** user or higher, the user has the ability to create the look and feel of what the employees will experience when they sign in into their Company's Dashboard (the Home Page) on Advanced HR 2.0.



It is important to note that Dashboard functionality is dependent on the user's role:

The **Base User** sees the following on their Dashboard:

- Their Time Off Balances and Requests
- Company Announcements
- Upcoming Review dates, with corresponding Acknowledgements
- Upcoming Training Classes, with corresponding Acknowledgements
- The user's expiring Certifications and Licenses, with corresponding Acknowledgements

The **Base Admin** and the **Base Manager** see the following on their Dashboard:

- Their Time Off Balances and Requests
- Employee Pending Time Off Requests for those that they are the designated approver

Time Off Requests (Pending)

	Time Off Start	Employee	Hours
	07/09/2019	Bartowski, Charles (1)	128.00
	07/18/2019	Jones, Betty (11)	36.00

- Company Announcements

Company Announcements

Kite Flying Day - *4/15/2019*

Tomorrow!

Pizza Lunch - *6/23/2019*

Quarterly Company Meeting July 20th!

Pizza will be provided for this meeting.

- Upcoming employee Birthdays and Anniversaries

Birthdays

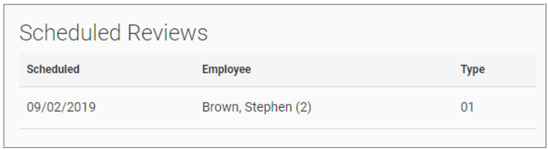
Birthday	Employee
September 16	Jones, Edward (4)
October 29	Baker, John (91)

Employee Anniversaries

Date	Employee
September 25	Emerson, Newton (12)
October 15	Hasley, Chris (13)

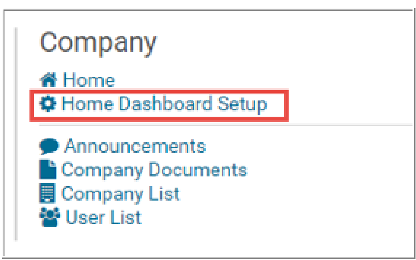
The **Base Admin** and the **Base Manager** see the following on their Dashboard:

- Employee Certificate and License Expirations
- Employee Scheduled Reviews



Note: Base Managers, with regards to employee Birthdays and Anniversaries, Certificate and License Expirations, Scheduled Reviews, and Time off Requests, will only view the employees that are assigned to them. However, Base Admins will see *all employees* in the company.

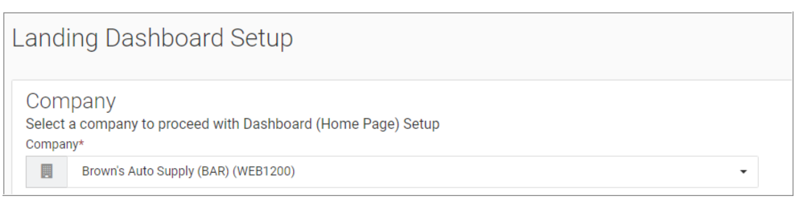
Company Dashboard Setup



The **Home Dashboard Setup** screen is where the **Base Admin User**, or higher, can set the different parameters that will determine what the employees will see when they login.

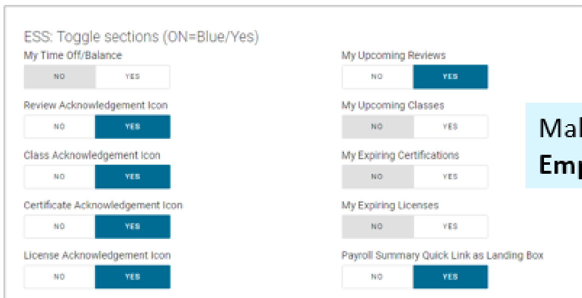
The Dashboard functions as the employee's ESS.

Go to **HR Admin – Company** – **Home Dashboard Setup**.



You'll be taken to the **Dashboard Setup** screen. Using the **No/Yes** toggles, you can set the Dashboard Settings for both the Admins/Managers and for the Employee roles.

Make the Dashboard settings for the **Admin/Manager roles** in this section.



Make the Dashboard settings for the **Employee roles (ESS)** in this section.

In the Dashboard Settings tile, it's important to note that for the various categories, if they are set to **Yes**:

- For the **Base Admin Role**, they will see ALL birthdays, expirations, time off requests, etc.
- For the **Base Manager Role**, they'll see only the employees that they supervise.

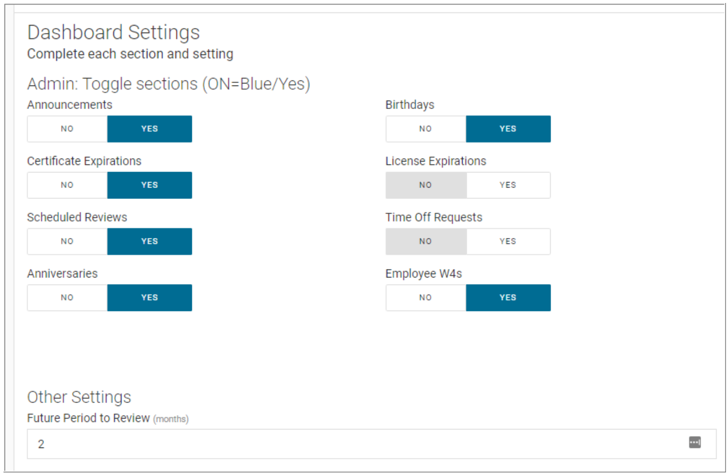
Select your company from the **Company** dropdown, which displays the companies that have already been onboarded from Evolution Classic into Advanced HR 2.0. You must be a **Base Admin** or higher security level to be able to make the Company Dashboard Setup settings.

Note: What displays on a user's Dashboard is dependent on the user's assigned security role.

The **Dashboard Settings** screen is divided into two main sections, one for the **Admin** / **Manager** role and one for the **ESS** (End user role). Making the settings for each role is discussed below.

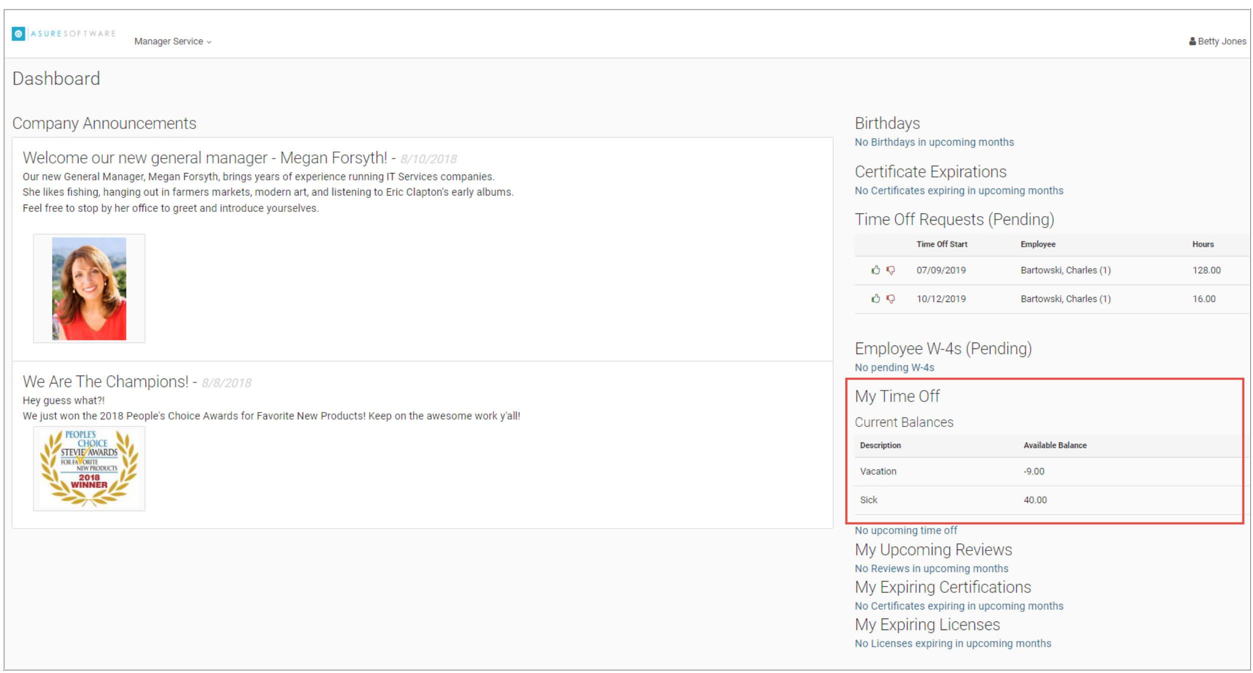
Setting the Dashboard View for the Base Admin and Base Manager Roles

As with other setup screens in Advanced HR 2.0, the functionality allows the user to turn on and off areas of the Dashboard by using the **No/Yes** toggles. Here is the **Admin**/Manager section of the screen.



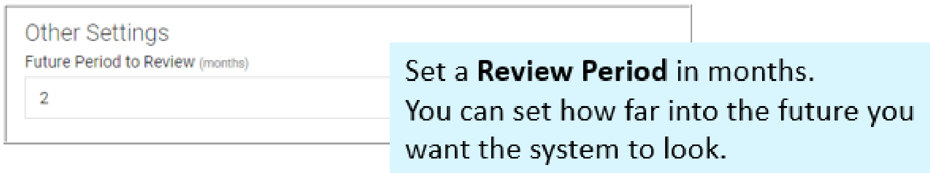
In the example above, we can see the **Yes/No toggles** for the **Admin view**. In this case, the user would be able to see everything except **Anniversaries**. As previously discussed, this would be the view for the **Base Admin User** and the **Base Manager User.** These settings can be edited at any time.

If the **Time Off Requests** toggle switch is set to **Yes**, then all admin and manager role users will have their time off balances and requests display on their **Dashboard**, in the **My Time Off** pane on the right.



Refer to the *Advanced HR 2.0 Time Off Guide* on the **Evolution Resource Center** for more information about time off balances and requests displaying on the Dashboard and about the Time Off Accrual feature.

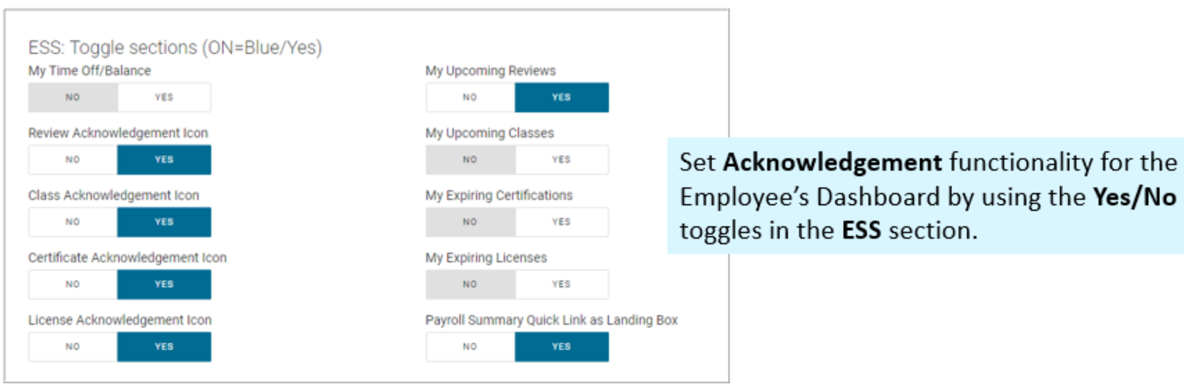
Other functionality on the Dashboard Setup screen that is important to make note of, is **Future Period to Review** for **Base Managers** and **Base Admins** in the **Other Settings** section of the screen:



Set this field to the number of months into the future that you want the system to look in order to display on their Dashboards ALL the upcoming employee events, including Reviews, expiring Licenses and Certificates, and Birthdays for their employees.

Setting the Dashboard View for the Base User Role

Use the **ESS** section of the screen to set the Dashboard view for the **Base User** role. Again, you use the **Yes/No** toggles to set the parameters of what the user will see on their Company Dashboard.



Base Users, can be set to see or not to see the following items:

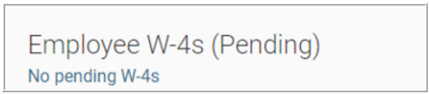
- Their upcoming **Reviews**
- Upcoming **Classes** they've enrolled in
- Any expiring **Certifications** or **Licenses**

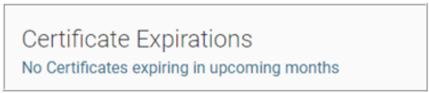
In addition, **Base Users** can be set to acknowledge:

- Employee reviews
- Classes
- Expirations

Always remember to click **Save Changes** when complete.

If the **Time Off Requests** toggle switch is set to **Yes**, then all **employee base users** will have their time off balances and requests display on their **Dashboard**, in the **My Time Off** pane.

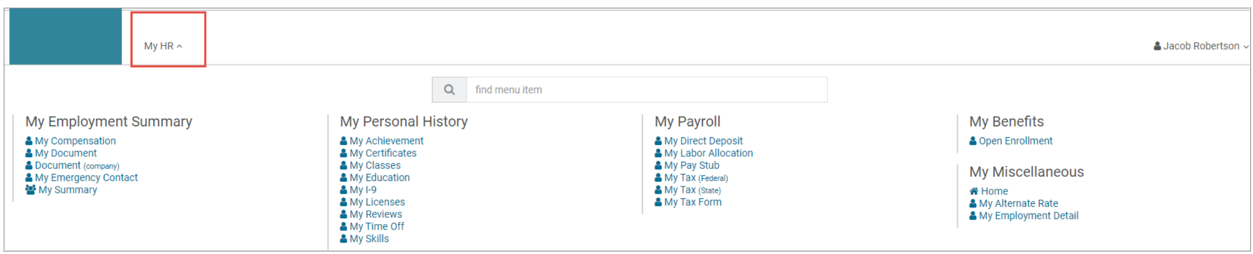




Note that even if there are no items for each of these categories, the headings themselves will display on the user's **Dashboard**.

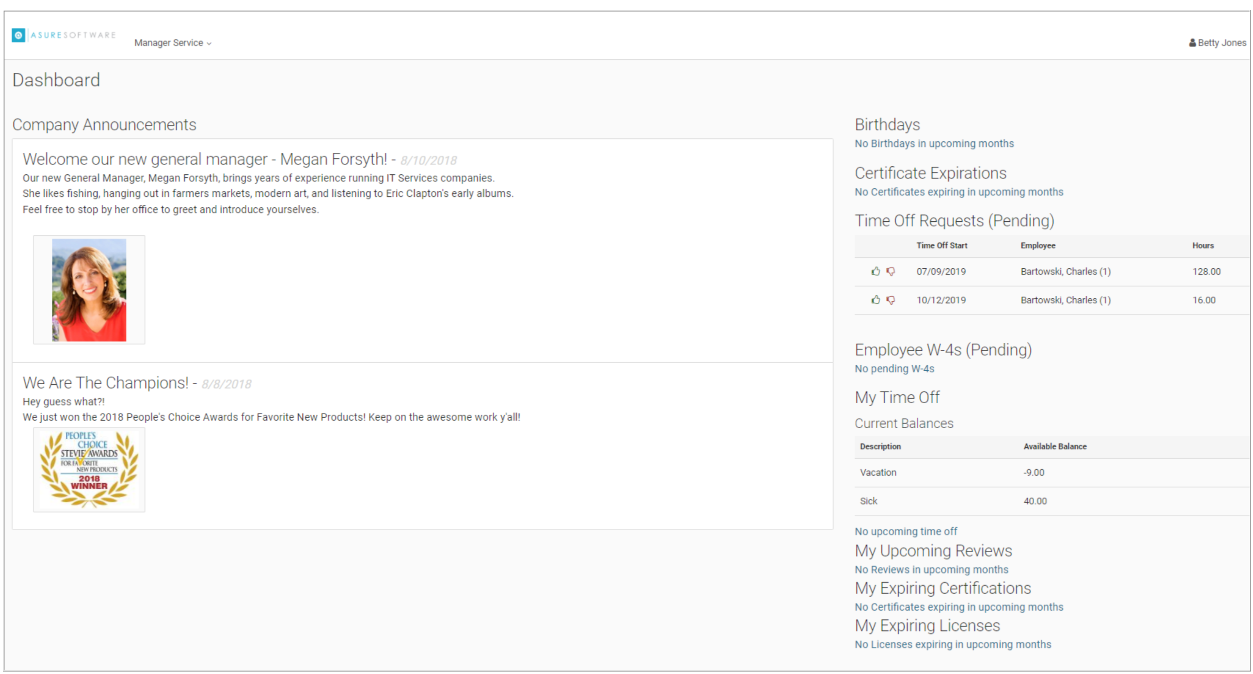
Now that the Dashboard settings for the Base Users, Base Managers, and Base Admins have been set, when those users sign in, they will be taken to the appropriate Dashboard view. Let's examine what these different roles will see.

Base User Role Company Dashboard



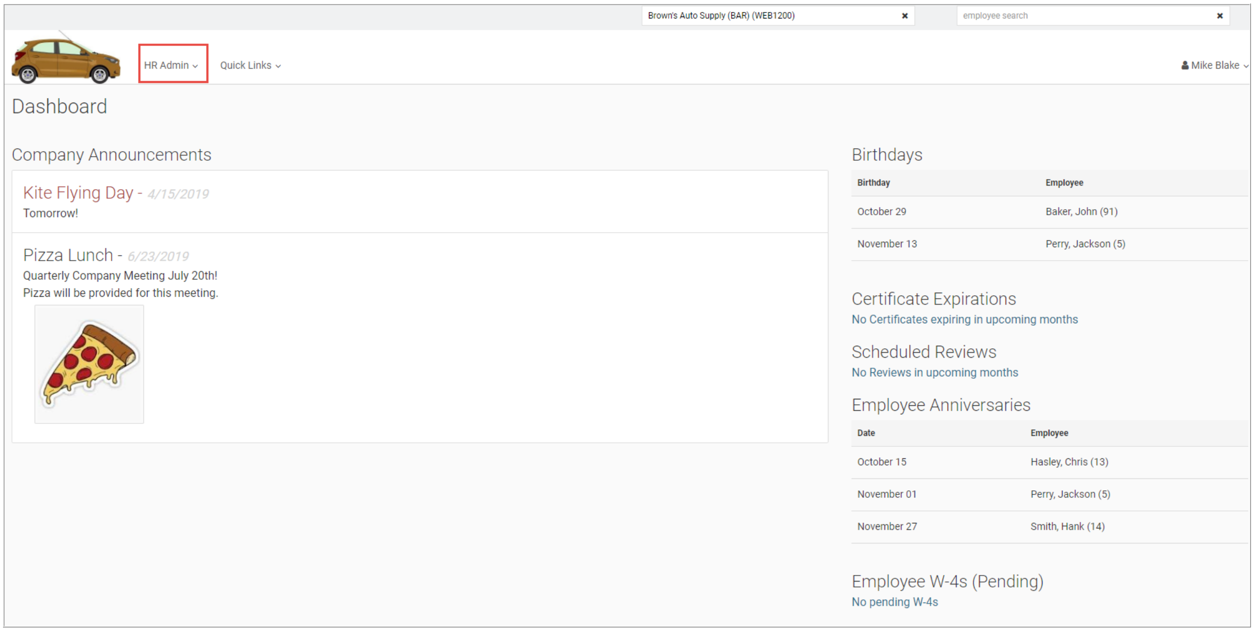
A **Base User** role's Dashboard has a **My HR** tab only.

Base Manager Role Company Dashboard



A **Base Manager** role's Dashboard has a **Manager Service** tab and may also have a **My HR** tab.. The **Manager Service** tab provides additional functionality for the Manager role – more/different menu items than **My HR** tab.

Base Admin Role Company Dashboard

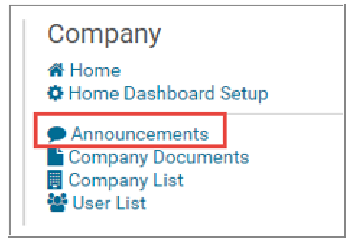


A **Base Admin** role's Dashboard has a **HR Admin** tab, a **Quick Links** tab, and may also have a **My HR** tab.

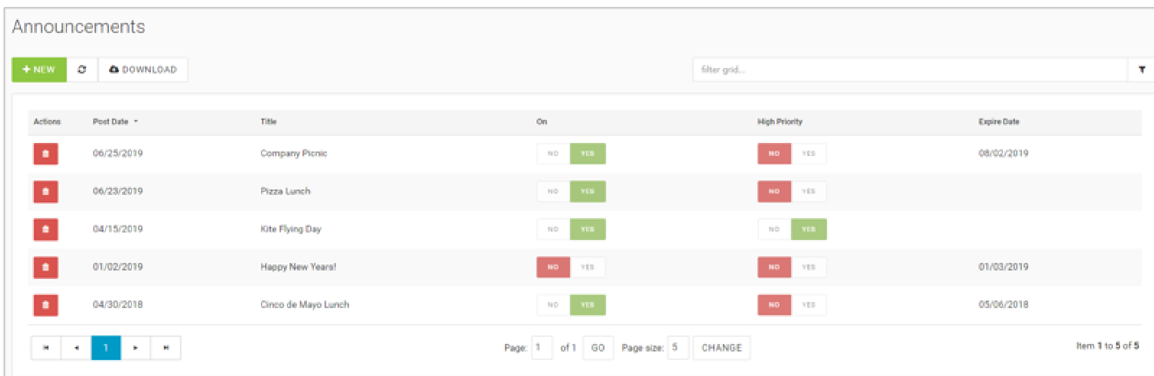
Company Announcements

This is where you will view and edit your current company announcements that will appear on the **Announcements** section of the Company **Dashboard**. You can set up new announcements, for example, for open enrollment or a company food drive.

The user can enable and create Company Announcements to appear on the Dashboard. Go to **HR Admin – Company - Announcements.**

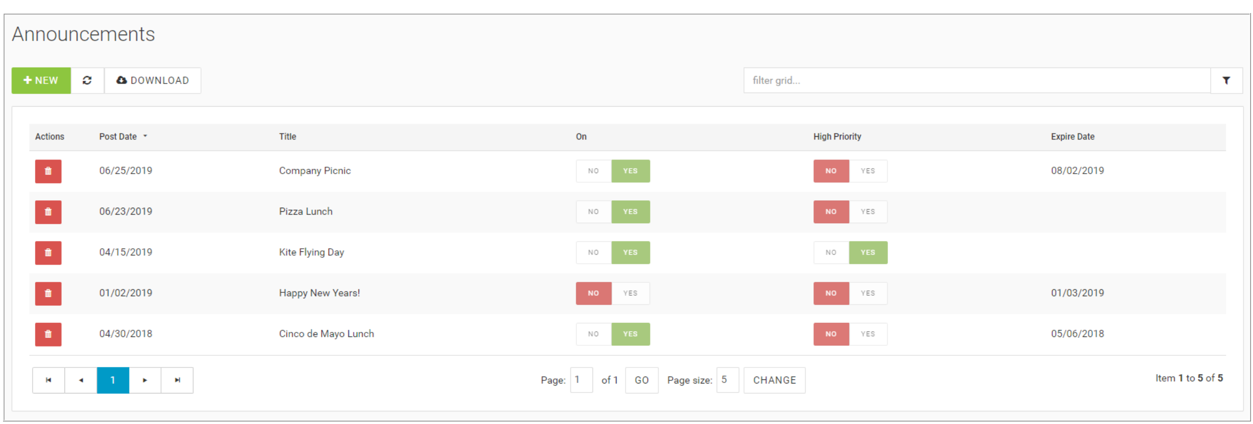


To create a new Announcement, click on the green **+ New** button.



Announcements (as long as they are set to 'On') will be visible to *all users* regardless of their security role. The same announcement will appear for Admins, Managers, and Base Users.

Each announcement will be presented in chronological order with the High Priority announcements appearing at the top of the list. You can also set a begin **Post Date**, delete an announcement, switch it to **No** to hide visibility, or switch it to **Yes** to make the announcement visible. Any announcements with a value in the **Expire Date** column field will automatically stop being displayed upon reaching the expiration date.

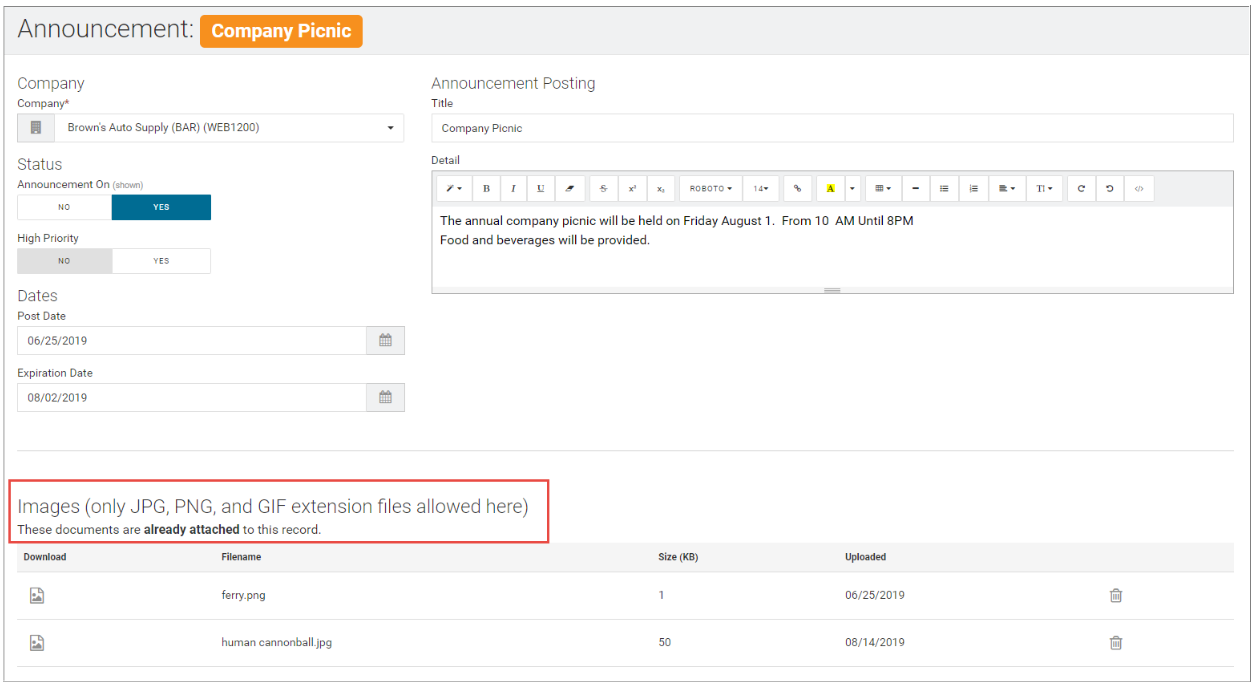


You can also add documents, pictures, and links to videos in the Announcements screen.

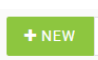
From the **Announcements** dashboard, you can see:

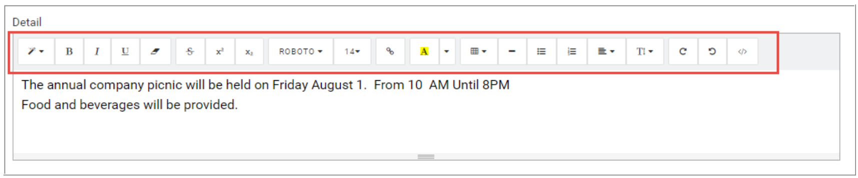
- **Post Date** of the Announcement
- Announcement **Title**
- Whether it is Active or not (**On**)
- If it is a **High Priority**
- **Expiration Date** of the Announcement

To open an announcement, click on an announcement row on the dashboard. The system displays the Details screen. You can easily create and customize any announcement that will appear on all the Dashboard for all employee users.



To create a new announcement:

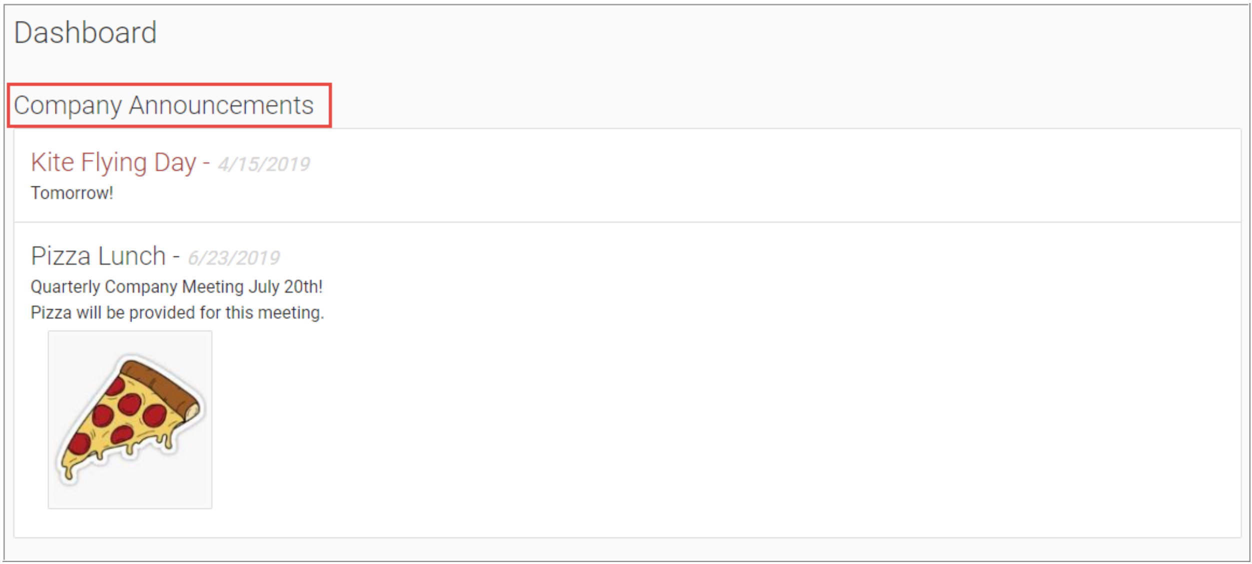
1. Go to **HR Admin – Company – Announcements**.
2. The system displays the **Announcements** screen. The screen displays a list of all announcements, both Active and Inactive.
3. Click on the green **+ New** button  to display the **Add Announcement** dialog box. This is where you will add your content, set the announcement visibility and priority, and the posting and expiration date. You can either drag and drop or browse and select images for each announcement.
4. Complete the information as described in the following table.

Field / Button	Description
Company *	Select the correct company, if not already selected.
Announcement Posting section	
Title	Enter a title for the announcement. This will appear on the Dashboard.
Detail	Enter the detailed text (the wording) for the announcement. This will appear on the Dashboard. Note the Advanced HR editor buttons at the top of the **Detail** section which allows you to format the announcement. 
Status section	
Announcement On	Click on the **No / Yes** toggle buttons to set if the announcement should currently display.
High Priority	Click on the **No / Yes** toggle buttons to set if the announcement should be a high priority. Selecting **High Priority** will cause the announcement to display at the top of the list.
Dates section	
Post Date	Select the date from the calendar that the announcement should first appear.
Expiration Date	Select the date from the calendar that the announcement should expire.
Images section	
Browse or Drag/Drop Images	You can drag and drop images for the announcement into this section. The image can be JPG, PNG, or GIF files. Or, click the **Browse** button to select an image. 
* = Required Field	

5. Click **Save Changes** or **Save and Next Record** if you have another announcement to add.

Images will be displayed in the order added from left to right, so give some thought about their placement *before* you add them.

Finally, the following screenshot is a sample of how an announcement you create on the **Announcement** screen appears in the **Company Announcements** section on the left side of the **Dashboard**, for employees of the company.



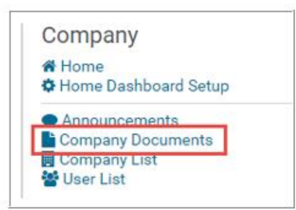
Company Announcements Display on the Dashboard for employees

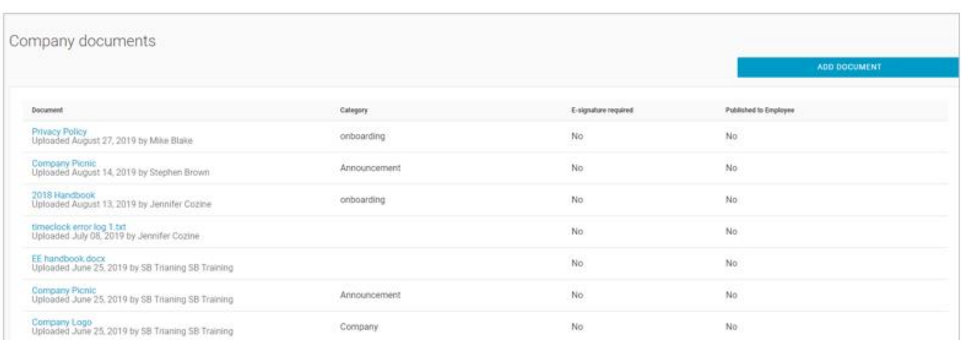
Company Documents

Users can upload documents to a central company document database that can be used for employee onboarding and for informational purposes, for example for a Benefits Packages summary document. When uploaded, these documents are viewable by all employees. In addition, employees can download documents, personalize them, and then upload them into their personal documents folder.

Adding **Company Documents** allows the user to upload documents that can be used for employee onboarding and for informational purposes on the employee's dashboard.

Go to **HR Admin – Company – Company Documents**



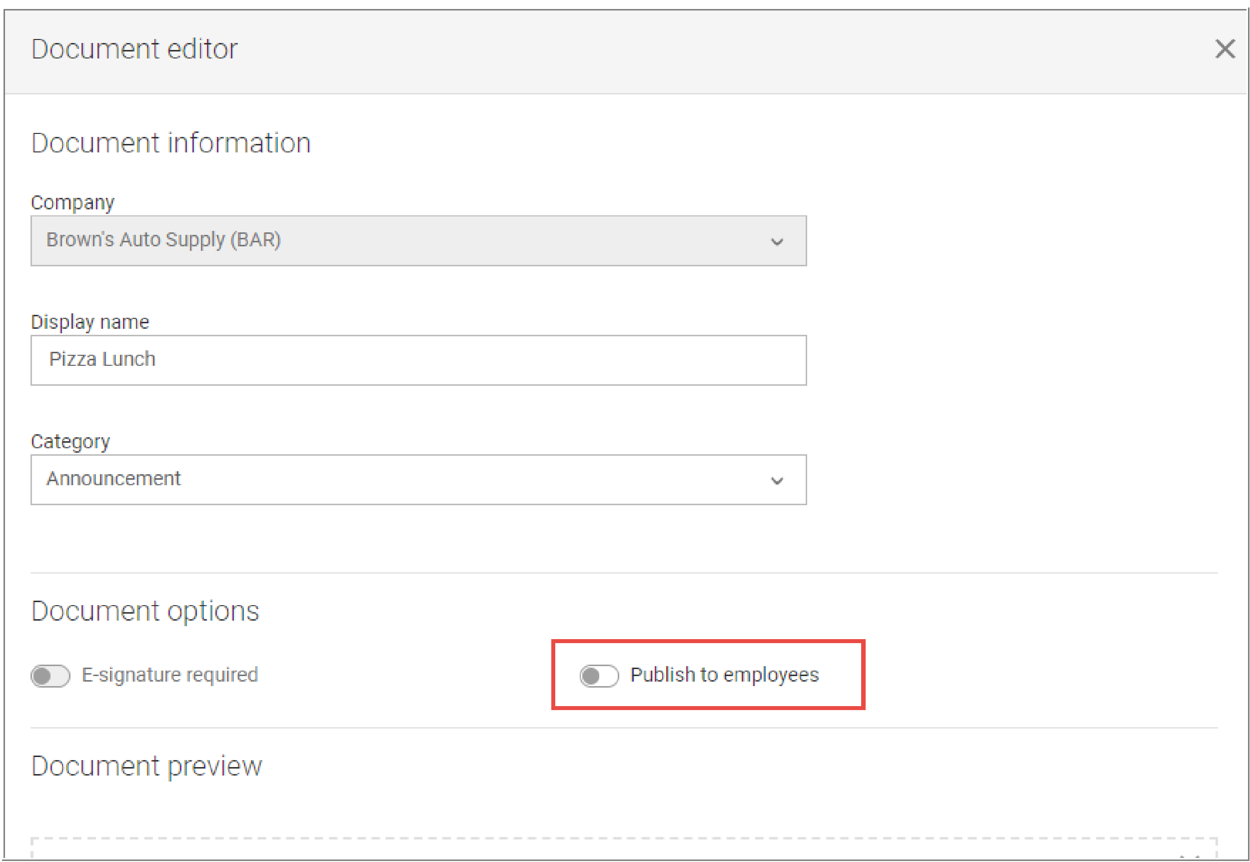


The Company Documents dashboard displays the following:

- The **Company** that the document is attached to.
- What type of **Download** the file is (JPG, PDF, csv …).
- The **Filename** and **Category** of the document.
- The **Title.**
- Whether or not it has been **Published to the Employee**. See below.
- The **Upload Date, Size**, and who it was **Uploaded By**.

Publishing a Company Document to the Employees' Document Folder

You can use the **Published to Employee** column field on the **Company Documents** screen to quickly switch an existing company level document to be published to or from the **Employee Documents screen (company)** folders for ALL of the employees in the company.



You can use the following column fields on the **Company Documents** screen:

Field / Button	Description
Published to Employee	Set this toggle option to on if this company document should be published to the **Employee Documents (company)** – the employee documents folder (for ALL employees).
E-Signature Required	Set this toggle switch to on if this document should require a single employee to E-Sign it. This type of document cannot be published to all employees.

Click on a Company Document item row on the **Company Documents** summary screen to display details about the document.

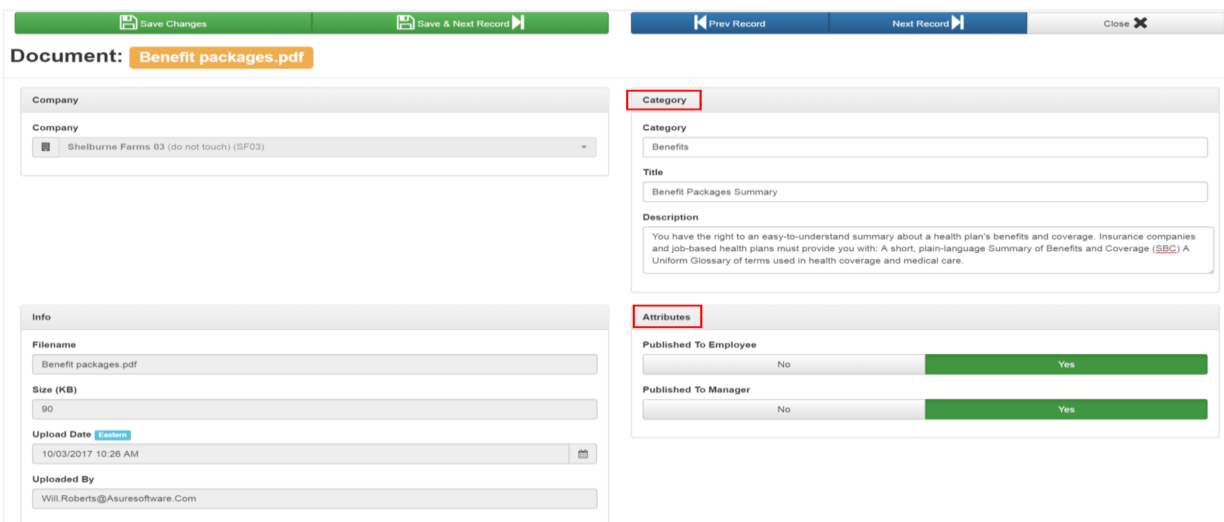
Editable fields include:

Category tile:

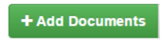
- Category
- Title
- Description

Attributes tile

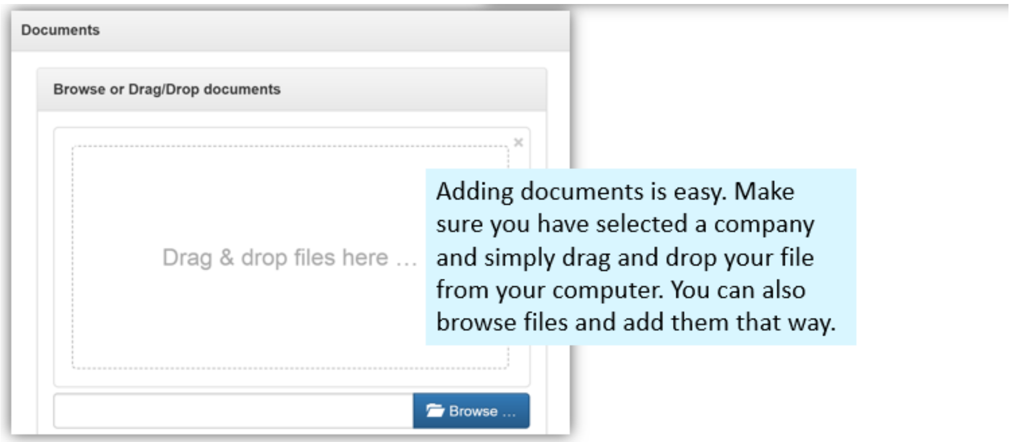
- Published to **Employee** (**No/Yes** toggle)
- Published to **Manager** (**No/Yes** toggle)



Adding a New Document

To add a new document, click on the green **+ Add Documents** button 

. The **New Documents** screen displays and allows you to either drag and drop or browse and select multiple files from your computer to upload. Make sure you are in the correct **Company**.



Warning: If you click on the **Browse** button to browse and select a document, you cannot drag and drop documents. Attempting to do this will cause severe problems and may terminate the session.

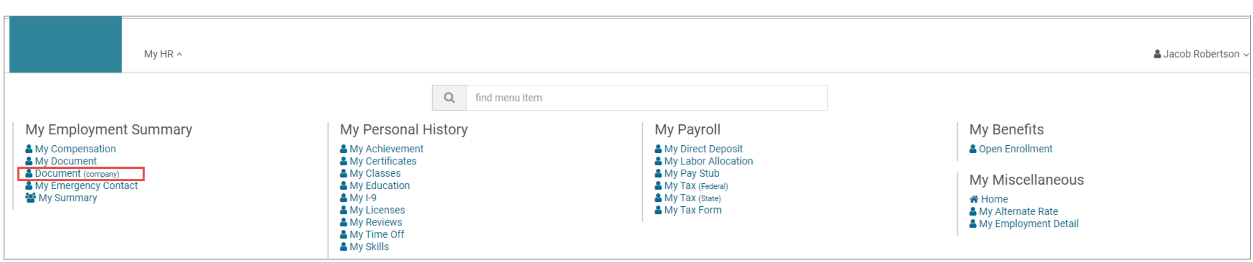
After saving a document, click on the document's summary line to open the dialog box and give your document a **Category**, **Title**, and **Description**. This is also where you can **Publish** the document **to** your **employees**.

After uploading multiple documents, sort the summary list chronologically by clicking on the **Upload Date** column and click on the first document summary line to open the dialog box.
Then use the **Save & Next Record** button to quickly move through each document.

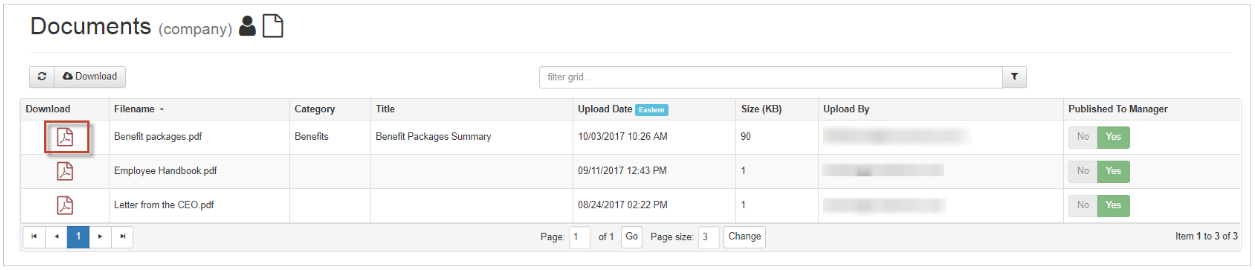
The document is now available for viewing by the employee.

For an employee to access a Company Document

1. Go to their **My HR** tab.
2. Under the **My Employment Summary** tile, click on **Document (company)**.



3. By clicking on the icon in the **Download** column, the employee can download and open the document.



Note that you can share a video via the published Company Documents to the employees. Go to **HR Admin – Company – Company Documents**. Upload your video and move the **Publish to Employee** toggle to **Yes**. When the employee looks at the **My HR – Employment Summary – Document (company)**, the video will be available for download. You may experience File Size limit issues if the file is very large.

Company Documents - Employee

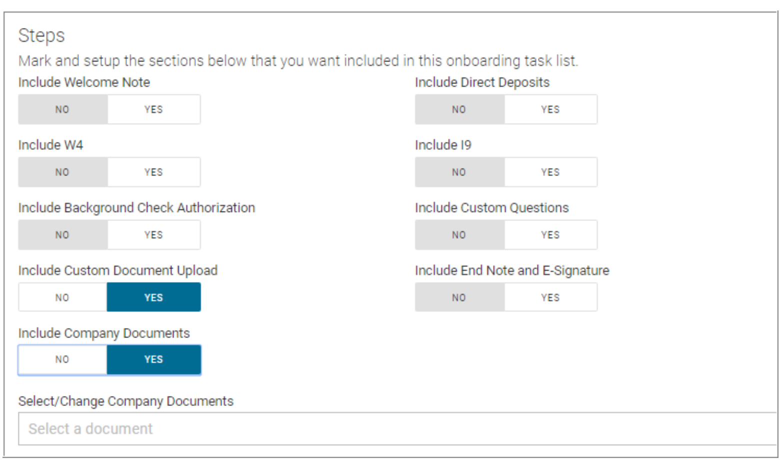
Documents can also be used for informational purpose with employees. When assigned to an employee or employees, documents can be accessed in the **My HR** tab on the Employee Dashboard.

When an employee goes to their **My HR** menu tab, they'll now be able to click on the Company **Document** link and see the uploaded documents.

Company Documents - The Onboarding Task List

Documents can also be added to an Onboarding Task.

Go to **HR Admin – Onboarding – Task List** to create a new task. Onboarding Tasks allow you to set parameters, based on position, for new hires. When setting up an onboarding task, you have the ability to select any number of company tasks and documents to be used for onboarding. For now, however, let's just focus on the Documents portion.



Make sure the **No/Yes** toggle is set to **Yes** for **Include Company Documents**. The dropdown will draw from any company documents that you have uploaded.

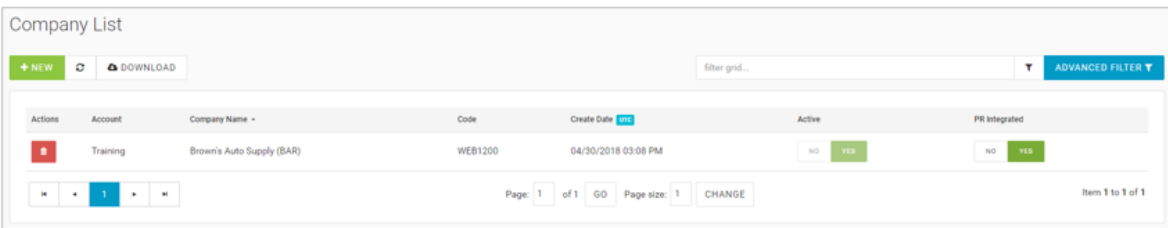
When the **Include Custom Document Upload** is set to **Yes**, this will allow the prospective new hire to upload a document to their application.

This process is covered in detail in the *Advanced HR 2.0 – Applicant Tracking Guide*.

Company List

The Company List shows a list of all the companies that have been cutover (onboarded) into Advanced HR 2.0.

The **Company List** shows a list of all the companies that have been onboarded, including the date. This dashboard also shows at a glance whether the company is **Active** and **Payroll Integrated**.



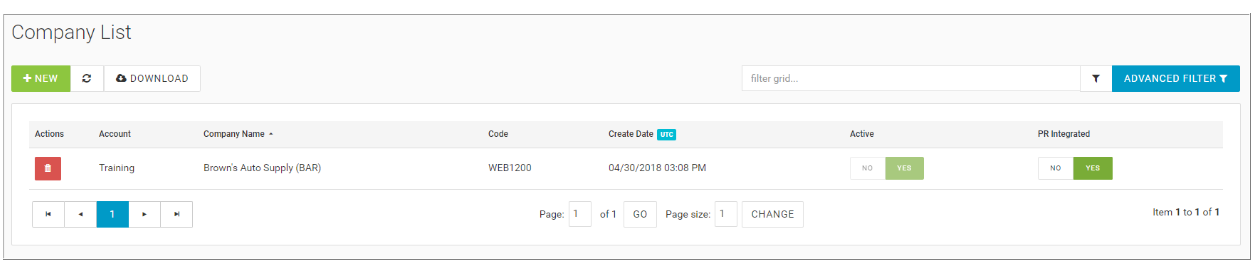
It's important to remember that the number of companies you can view will be dependent on your role.

The number of companies a user can view depends on the user's role:

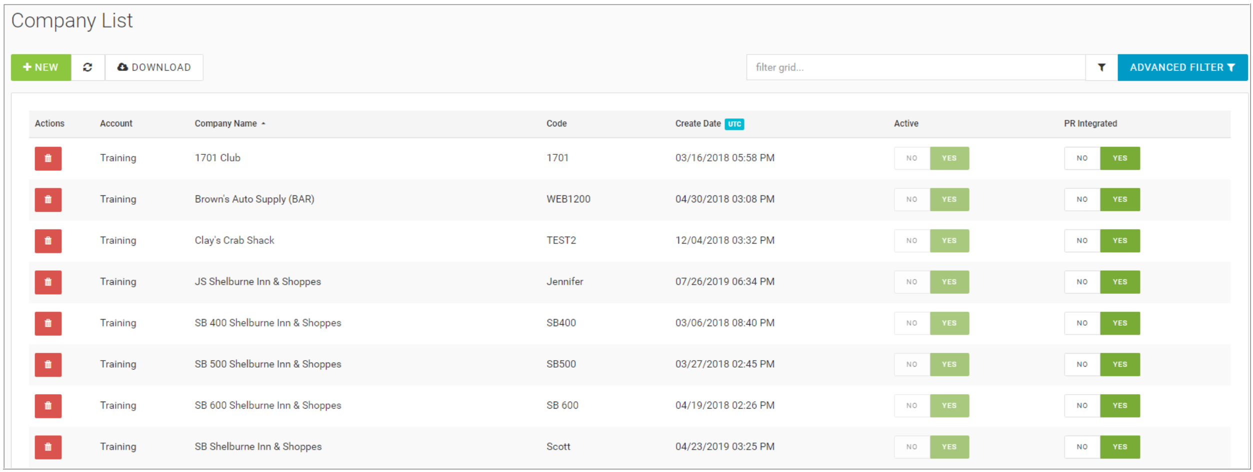
- A **Super Admin**, for example, will have access to all companies that have been cutover for the account.
- A **Service Bureau Admin** will only have access to the companies that are assigned to them.
- A **Base Admin** user will only see their own company.

To display the Company List screen:

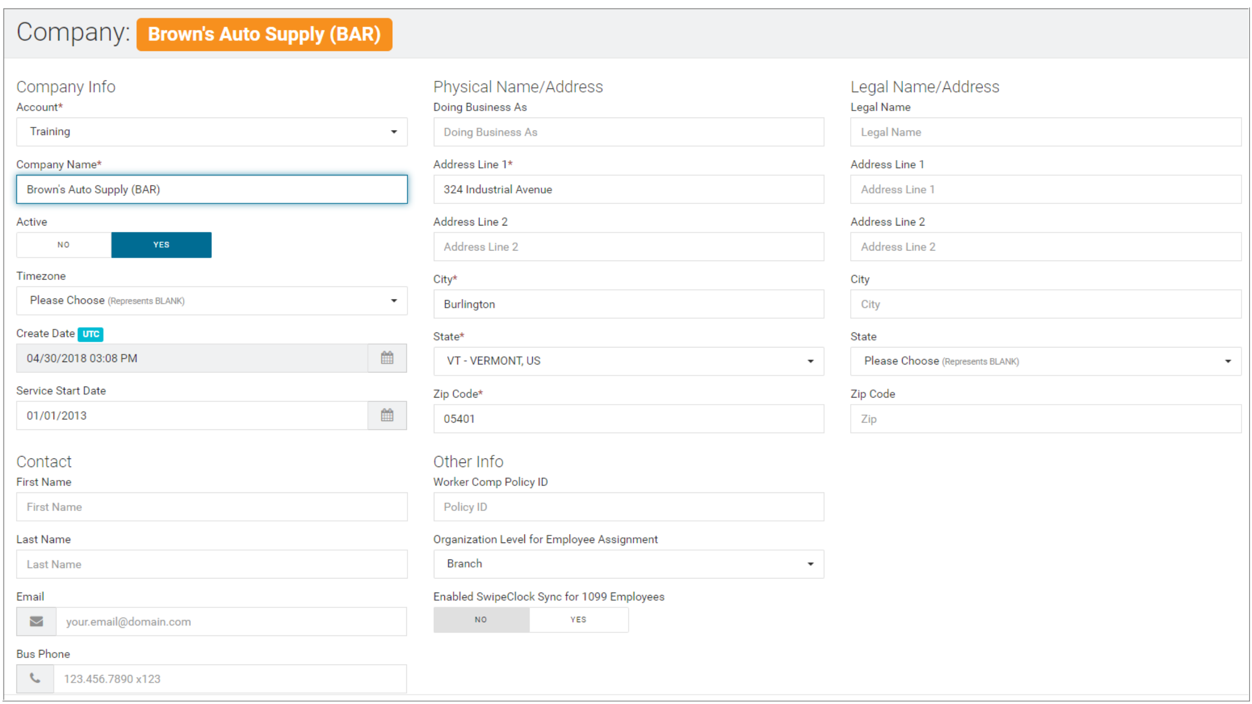
1. Go to **HR Admin – Company – Company List**.
2. If a company has been selected, you will only see that company on the **Company List** dashboard.



If, however, no company is selected, your view will include all companies:

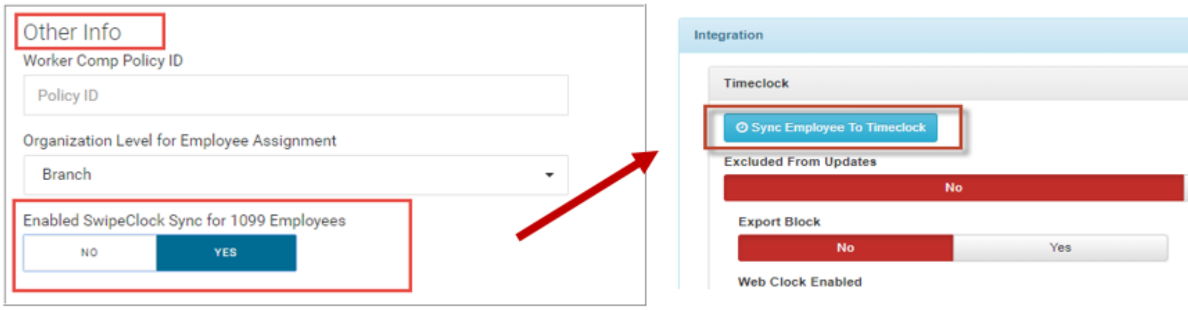


3. Click on the company which you want to work with to open the Company Configuration Settings screen.

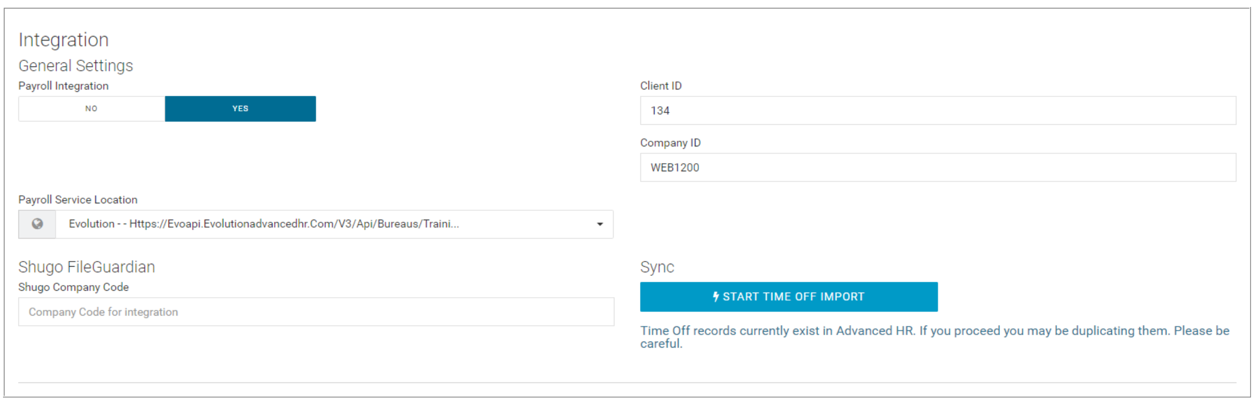


When a company is opened, you can view:

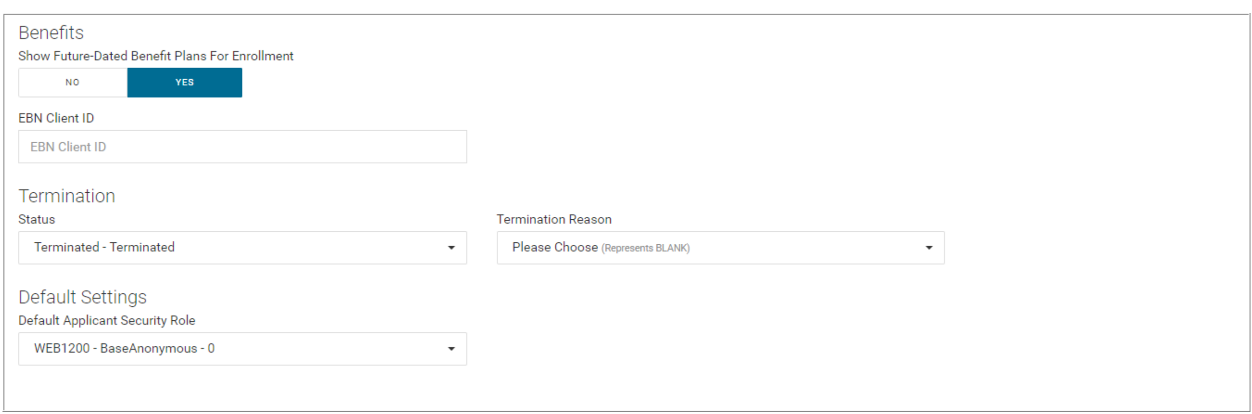
- Address and contact information
- Active or Inactive Status – Use the **No/Yes** toggles to change the status.
- Timezone and Creation date
- Organizational levels (DBDT)
- Payroll integrations. Note the **PR Integrated** column should always be set to **Yes**.

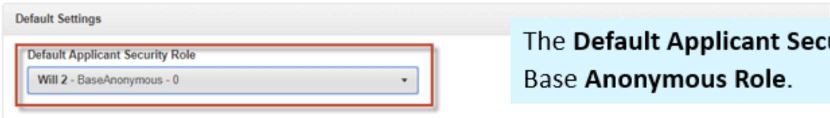


In the **Other Info** section of the **Company List** screen, the **Enabled SwipeClock Sync for 1099 Employees** Yes/No toggle button has been added in order to have a **Sync Employee to Timeclock** button appear on the **Employee Summary** screen.



Note: in order for Administrators to be able to help employees enroll in Open Enrollment using the **Employee Benefits** screen, in the **Company List** screen for this company, in the **Benefits** section, the **Show Future-Dated Benefit Plans for Enrollment** field toggle must be set to **Yes.**

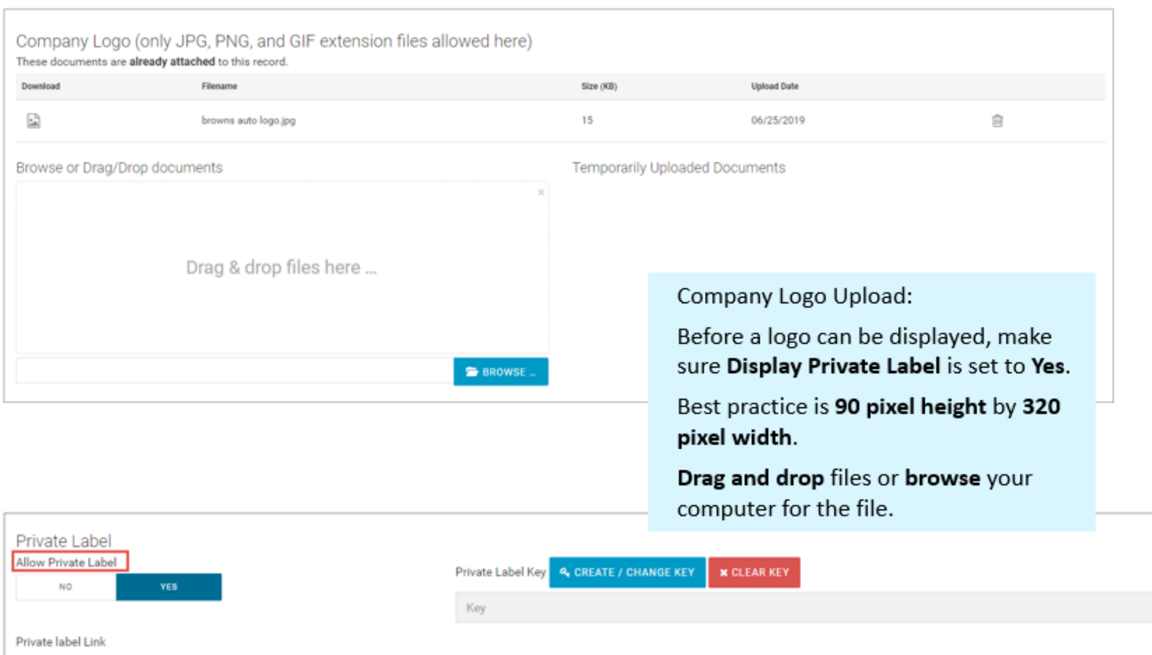




The **Default Applicant Security Role** must be set to Base **Anonymous Role**.

Note: With regard to Applicant Tracking, without specifying which role to use at the company level, no permissions will be applied to Job Postings because all permission rules must be tied to Users. Once again, this role needs to selected manually. Applicant Tracking is covered in the *Advanced HR 2.0 Applicant Tracking Guide*.

Company Logo Upload



Company Logo Upload:

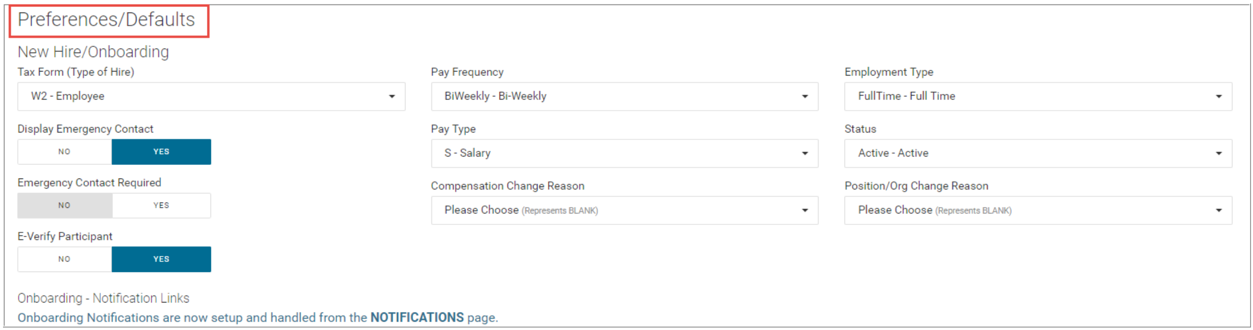
Before a logo can be displayed, make sure **Display Private Label** is set to **Yes**.

Best practice is **90 pixel height** by **320 pixel width**.

Drag and drop files or **browse** your computer for the file.

Preferences/Defaults section

The **Preferences/Defaults** section allows you to set the company level defaults for New Hire Onboarding. This is also where you can make Emergency Contact input a requirement and identify users who should receive onboarding notifications.



The **Preferences/Defaults** section has the following New Hire/Onboarding field defaults that you can set up for new hires. The specific defaults you can set here depend on the items created in the **Company Setup** screens. These are all optional fields.

Field / Button	Description
Tax Form (Type of Hire)	Select the Type of Hire you want to default in. For example: • **W2 –** Employee • **1099 –** Contractor
Pay Frequency	Select if you want to always default in a Pay Frequency for each new hire. Frequency Types are created in the **HR Admin – Company Setup – Frequency Types** screen.
Employment Type	Select the Employment Type that you want to default in for new hires. For example: • **Full Time** – Full Time • **Half Time** – Half Time • **Seasonal** – Seasonal Employment Types are created in the **HR Admin – Company Setup – Employment** screen.
Auto Pay	Select the automatic pay to default in for new hires. For example: • **Hours** – Pay default hours each paycheck • **Salary** – Pay base salary each paycheck
Pay Type	Select the Pay Type to default in for new hires. For example: **E02** – Salary Pay Types are created in the **HR Admin – Company Setup – Pay Group** screen.
Status	Select the Status value to default in for new hires, for example: **Active**. Status values are created in **HR Admin – Company Setup – Status Types**.
Display Emergency Contact	Select if you want to display the emergency contact info for new hires. Emergency Contacts for an employee can be added in the **HR Admin – Employee Maintenance – Emergency Contact** screen.

Field / Button	Description
Compensation Change Reason	Select if you want to default in a compensation change reason value. Compensation Change Reasons are created in **HR Admin – Company Setup – Compensation Change Reasons**.
Position/Org Change Reason	Select if you want to always default in a position / organization change reason value. Position/Organization Change Reasons are created in **HR Admin – Company Setup – Position/Org Change Reasons**.
Emergency Contact Required	Select if you want to require an emergency contact for each new hire.
E-Verify Participant	Select if you want to make each new hire an E-Verify participant (future).

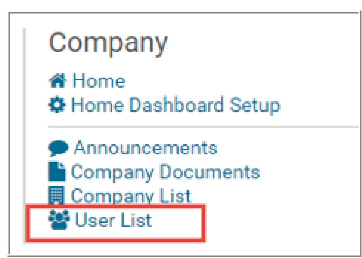
User List Screen and Adding a New User

The **User List** will show all the users in the system. However, if a company has been selected, only the users that are associated with that company will display.

To view a list of all the users in the system, or just the users associated with a particular company, go to **HR Admin – Company – User List**.

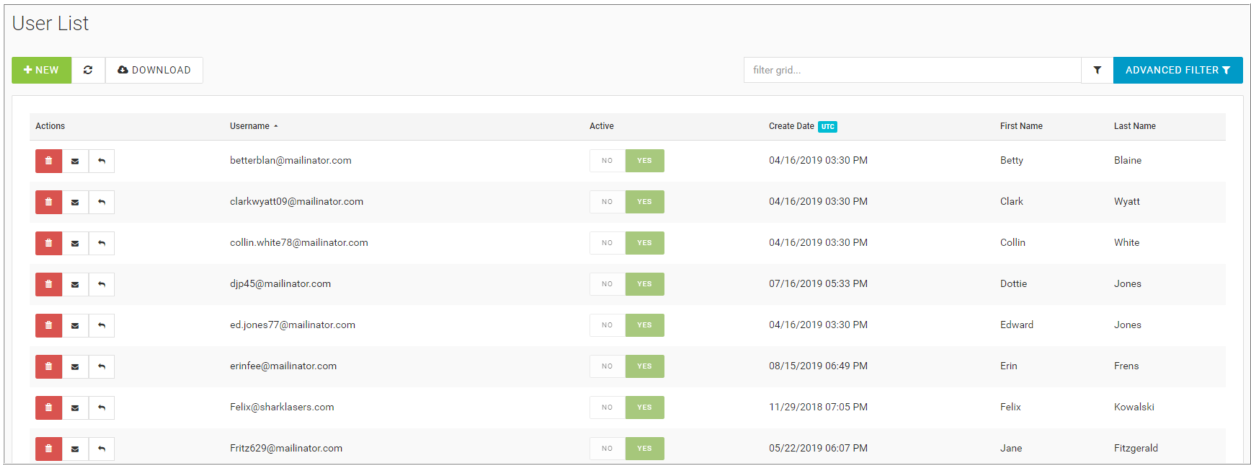
The **User List** is a key resource to quickly see whether an employee is a user in the system.

In addition, you can ascertain which security roles and access users have.



Important: To access their own Dashboard, an employee has to be **a user** in Advanced HR 2.0 in addition to being **an employee**. If an employee is not a user, when they try to sign in, they will only see a blank Dashboard.

To view a list of all the users in the system, or just the ones associated with a particular company, go to **HR Admin - Company - User List**.

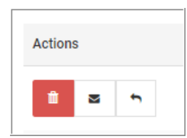


User List dashboard screen

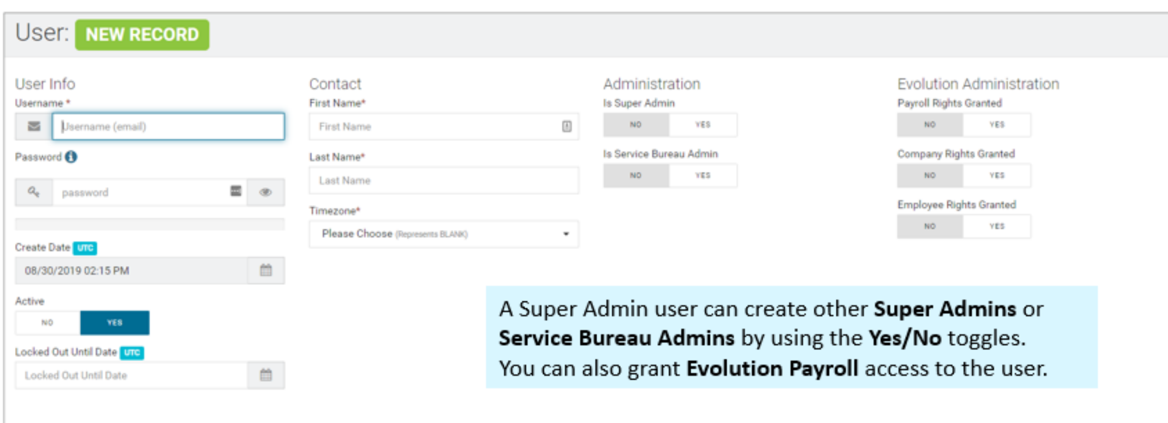
The **User List** dashboard displays all the users associated with a company. You can easily see:

- Usernames and given names
- Status and Creation Dates

In the **Actions** column (shown at right) you can:



- Delete a user (the red trash can icon)
- Send a Welcome Email (the envelope icon)
- Reset a user's password (the arrow icon)



Clicking on the **Username** will display a detail of their information. **Linked Companies** and **Security Roles** can be viewed and/or edited. The **User List** screen is also where you can do the following tasks:

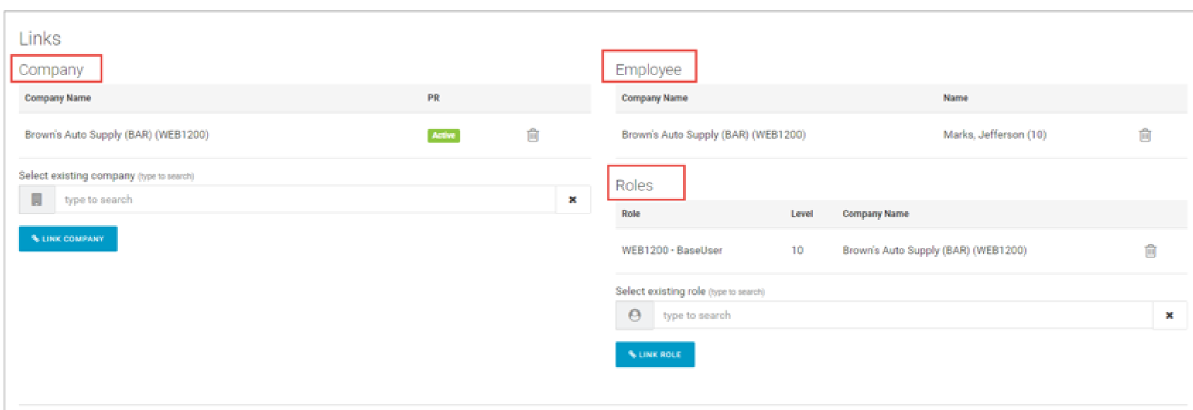
- View a user's username, first and last names, the date the user was created, and the user's security role and access information

- Inactivate a user (can also delete a user but this is not recommended, make the user **Inactive** instead)
- Link a user to multiple companies
- Link a user to a specific "Role"
- Lock a new user out of the system until a specific date and time
- Send a new user an onboarding Welcome email (the envelope icon)
- Reset a user's password
- If in Evolution Classic, you have set up the AHR 2 Security Groups (**AHR 2 Company**, **AHR 2 Employee**, **AHR 2 Payroll**) in order to ensure that the proper Payroll Rights are assigned to users who need access to payroll data, then in the **Evolution Administration** section, the three **Rights Granted** toggle switch fields on the right side will be set to **Yes**. If not set in Evolution Classic, they can be set to **Yes** here in Advanced HR and that information will flow back to Evolution Classic. If these are set to **No**, then the user will not have access to payroll data.

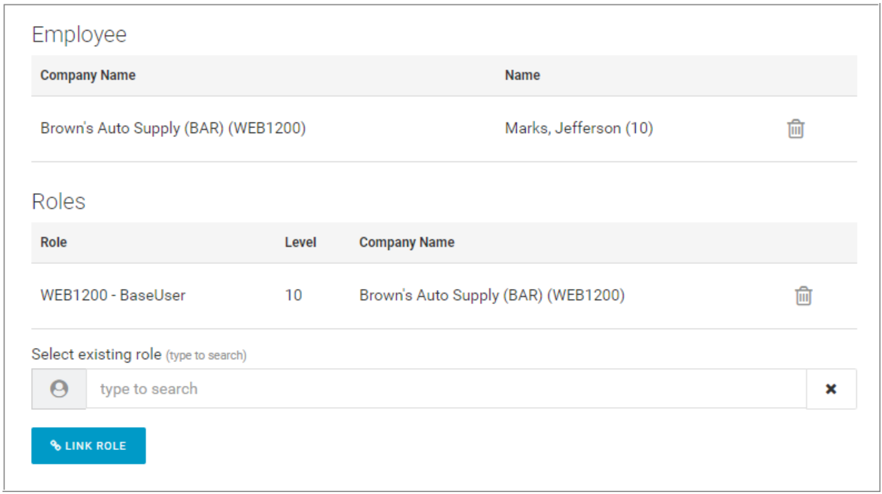
The Role a user is assigned to determines what they can see and do within Advanced HR 2.0.

The common roles in Advanced HR 2.0 are:

- **Base User** for employee self-service only access
- **Base Manager** for manager access
- **Base Admin** for Administrator access



A user's access is tied to their **Security Role(s)**. If the user is a Super Admin or Service Bureau Admin, they generally won't be tied to a company-level role. If, on the other hand, they are an employee of a company, they must have a company-level role.



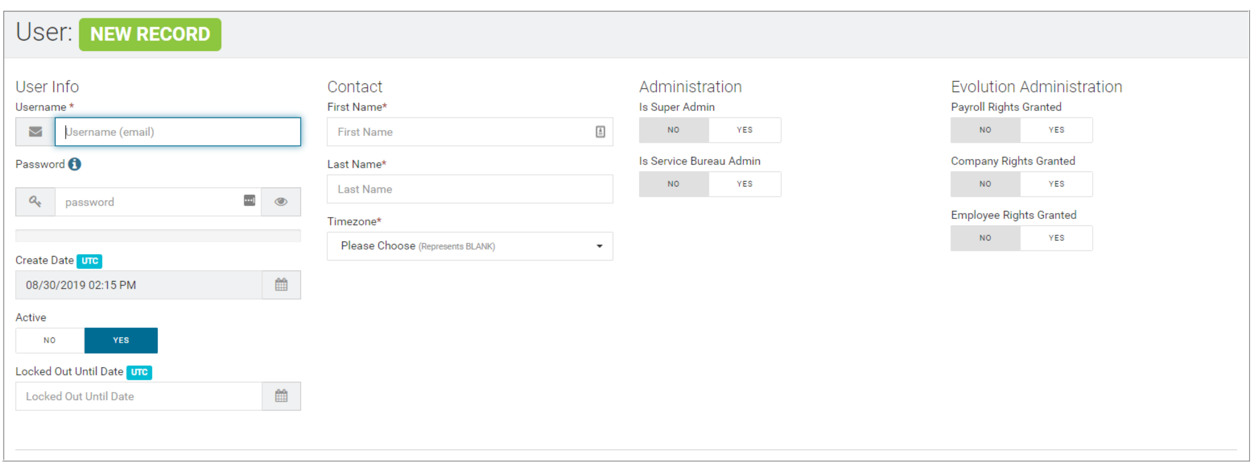
You can also create custom Roles with specific security settings.

Important: If you add a Role to a user in the **User List** screen you must also open the **Employee Summary** screen and link the Employee to the User.

Super Users and Service Bureau users already setup in Evolution will use their Evolution username for signing into Advanced HR 2.0.

To Add a New User in the System

On the **User List** screen, click on the green **"+ New"** icon  to open the **New User Record** screen.



Enter the following information:

1. **Username** (email address is required).
2. **Password** (optional, the user can change the password when signing in for the first time).
3. **First Name**, **Last Name**, and **Timezone** (all required).

Note: The Super Admin user can create other Super Admins or Service Bureau Admins by using the **No/Yes** toggles.

In addition, you can grant Evolution Payroll access to this user in the **Evolution Administration** section. This will let Evolution know that the user is an Evolution user as well. This access corresponds with the security groups that were created in Evolution Classic.

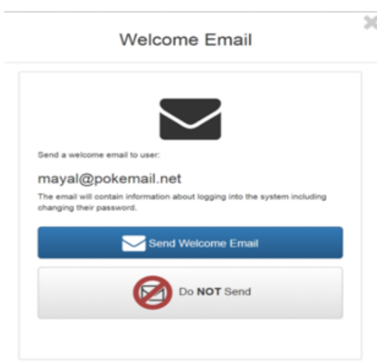
As you can see from the screens below there are significantly more settings options compared to the **Quick Add** screen. A good best practice is to always set up new Users in this area of Advanced HR 2.0.

The **Locked Out Until Date** field allows you to lock a new user out of the system until a specific day and time. This is helpful for situations where you may not want the new employee signing in and viewing information that you have not yet communicated.

The **Links** section - explained below - allows you to link a user to one or more companies. Users will only have access to the companies they are linked to in this section.

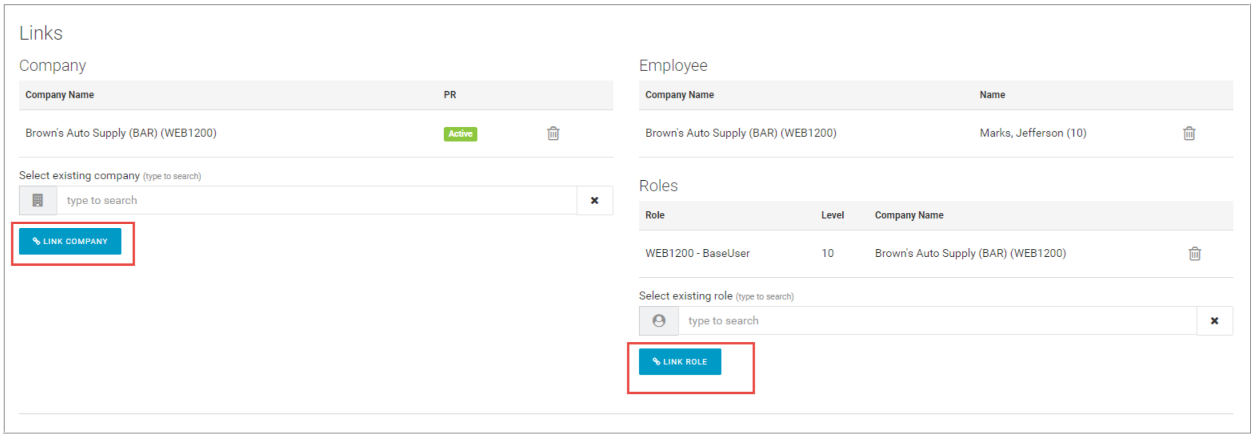
Note: Any users accessing payroll data for multiple companies will need to have **Multi-Company User** turned on.

4. Click **Save Changes**.



A **Welcome Email** popup will appear giving you the option to send an email with sign in instructions.

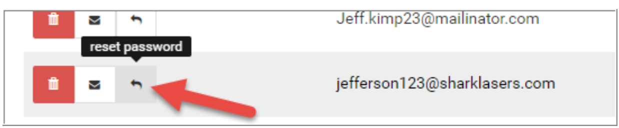
5. Now that your user has been saved:
   - Find them in the **User List Dashboard** screen.
   - Click on their **Username** to display their information.
   - Enter additional information such as:
     - Linking them to a company.
     - Applying Security Role(s).



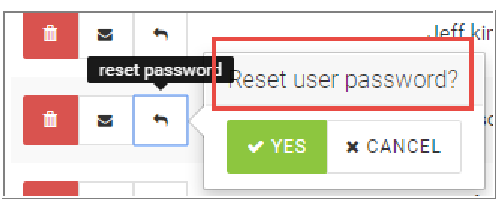
Resetting a User's Password

You can reset a user's password from the **User List** screen.

1. Go to **HR Admin – Company – User List**.
2. Lock into a **Company**, if not already selected.
3. On the **User List** screen, find the employee for which you want to reset the password.
4. In the **Actions** column, click on the arrow icon to reset that user's password. Hover your cursor over the icons until you see the text: **reset password**.



Click the arrow icon. The system prompts "**Reset user password**?".



Click **Yes**. The system will send an email to the user to reset their password.

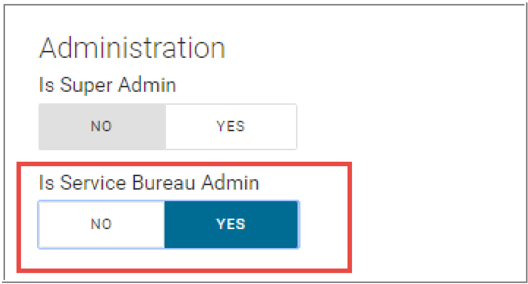
Creating Service Bureau (SB) Admins and Assigning them Clients

Create the SB Admin User

Use the following steps to create a User with a Security Role of **SB Admin**:

1. Go to **HR Admin - Company - User List**.
2. Click the green **New** button.
3. Enter a **Username** (must be an email address).
4. Contact information and Time Zone.

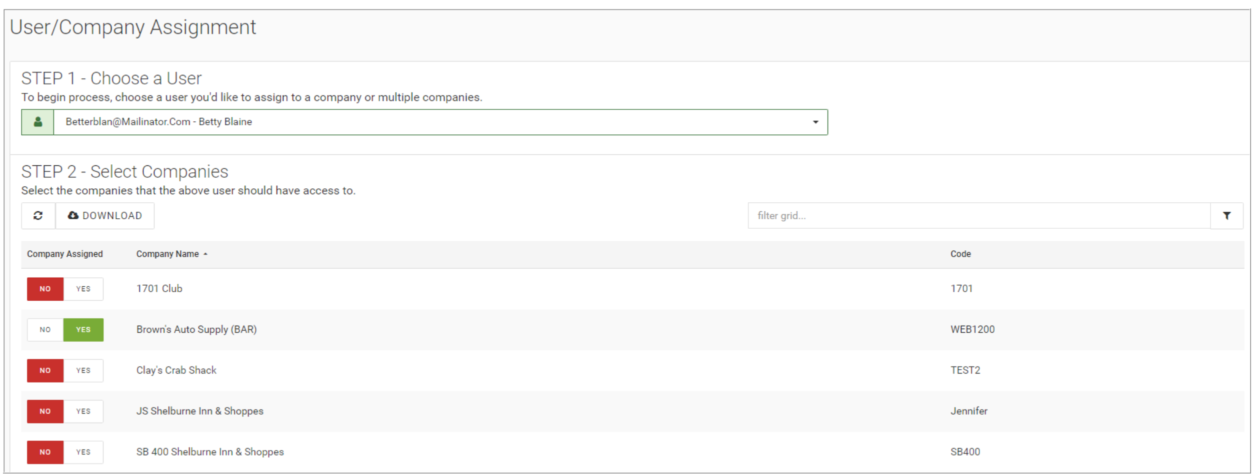
5. Use the **No/Yes** toggle to designate them as a **Service Bureau Admin**.



Assign Company(ies) to the SB User

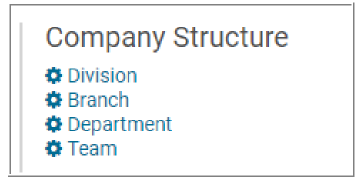
Now that you've created your Service Bureau Admin user, you can then assign them the companies that you want them to have access to:

1. Go to **HR Admin - Account User/Company Assignment**
2. Choose a User from the dropdown.
3. Select the companies that you'd like them to have access to.
4. When you enable access, the system will update automatically.



Company Structure Menu

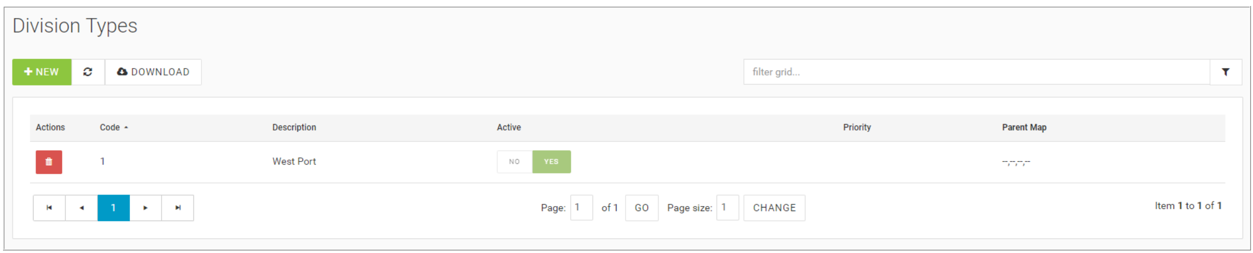
Displays information about the Company Organization (**DBDT** structure). Note that if you change the company structure (DBDT) information in Advanced HR 2.0, the changes will update the DBDT information in Evolution Classic.



Note that by default, you can assign employees to Organization Types (DBDT) at any level. However, Advanced HR 2.0 does allow you to set a minimum organization level that an employee can be set to.

Division

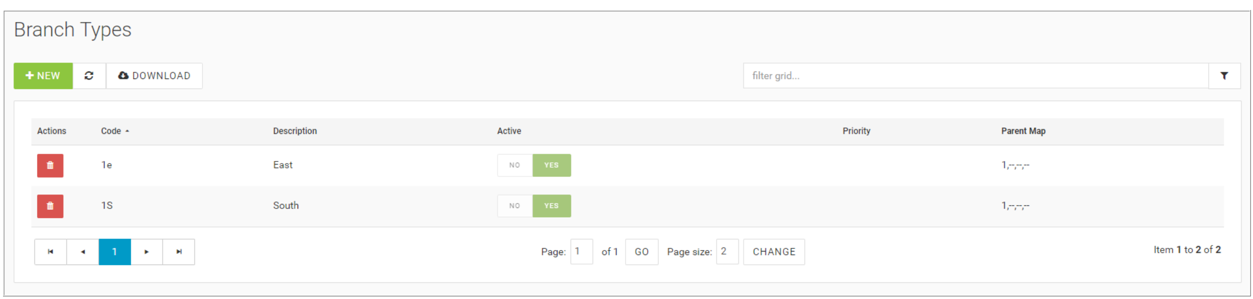
Displays the Division Types set up for this company.



Click the **+ New** button to create a new Division type.

Branch

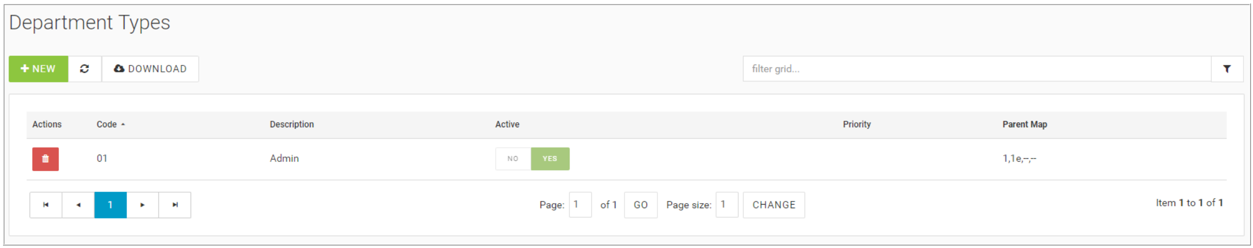
Displays the Branch Types set up for this company.



Click the **+ New** button to create a new Branch type.

Department

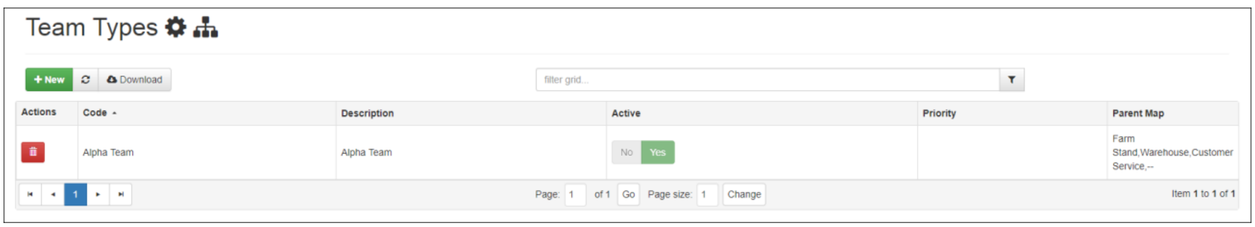
Displays the Department Types set up for this company.



Click the **+ New** button to create a new Department type.

Team

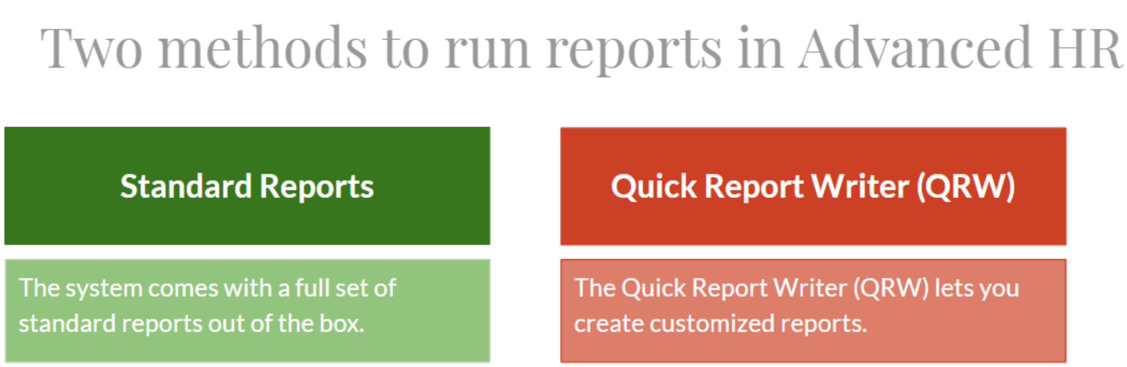
Displays the Team Types set up for this company.



Click the **+ New** button to create a new Team type.

Reporting Menu

The following graphic indicates the two methods you can use to run reports in Advanced HR.

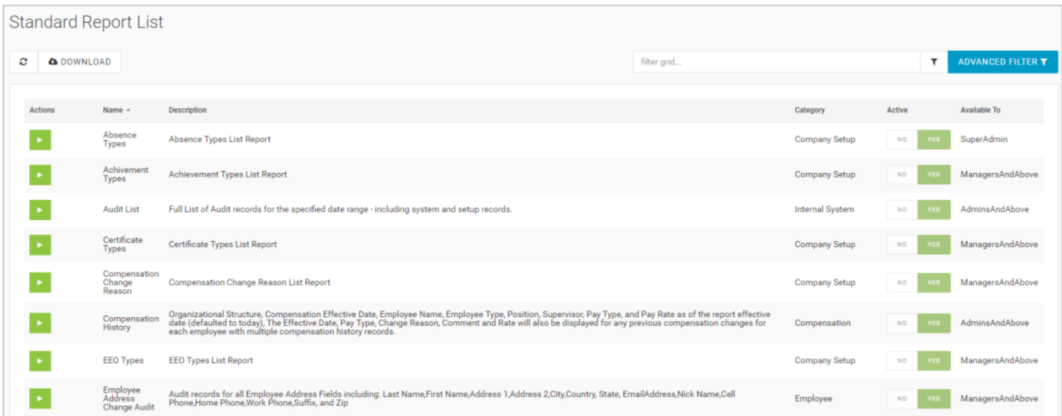


Note: This section presents a brief overview of the reporting features. For more information, including a list of the Standard Reports, see the separate document *Advanced HR 2.0 - Reporting Guide*.

Standard Reports

Advanced HR 2.0 has a library of standard reports that you can run by clicking on the green arrow icon to the left of the report. Go to **HR Admin – Reporting – Standard Reports**.

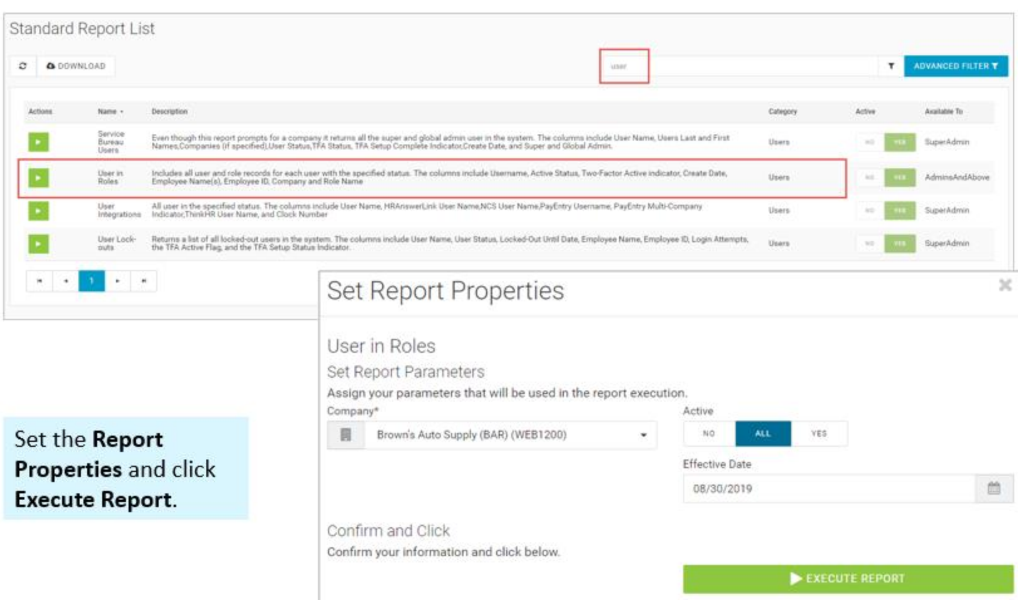
Note that you must have **Base Manager** user role or higher to use the standard reports.

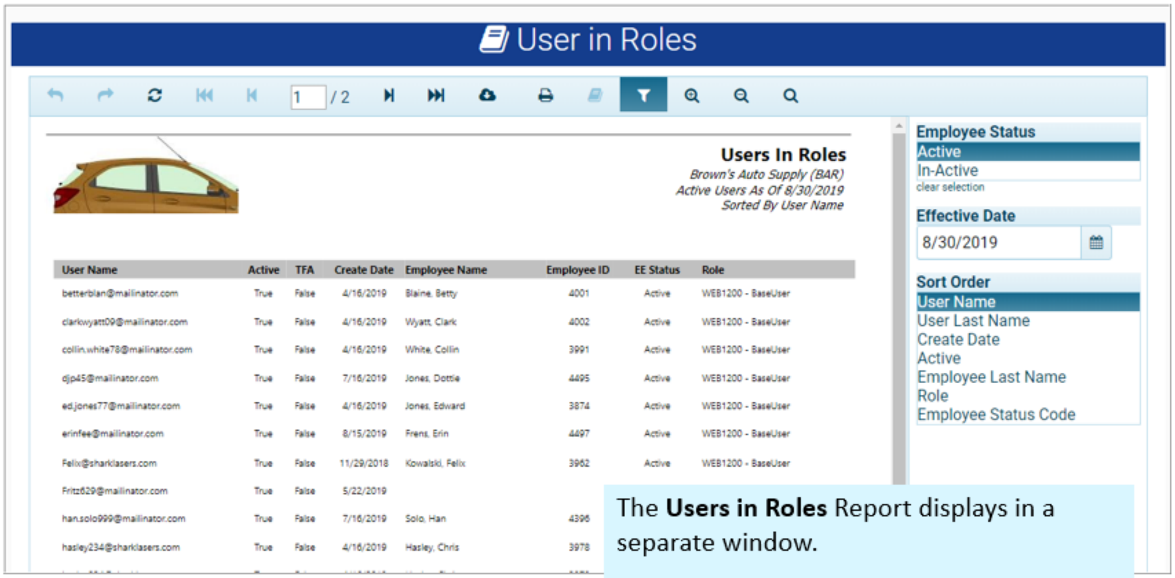


Standard Reports screen

The Standard Reports display on the summary screen in alphabetical order. Notice that you see the **Name**, **Description**, **Category**, **Active Status**, and who the report is **Available To**.

For example, search on **User** in the filter box and click the green arrow for the **Users in Roles** report.



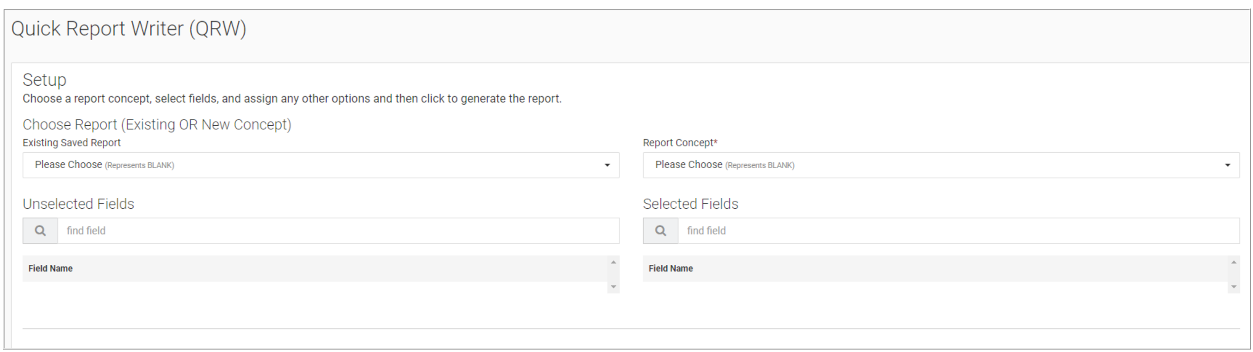


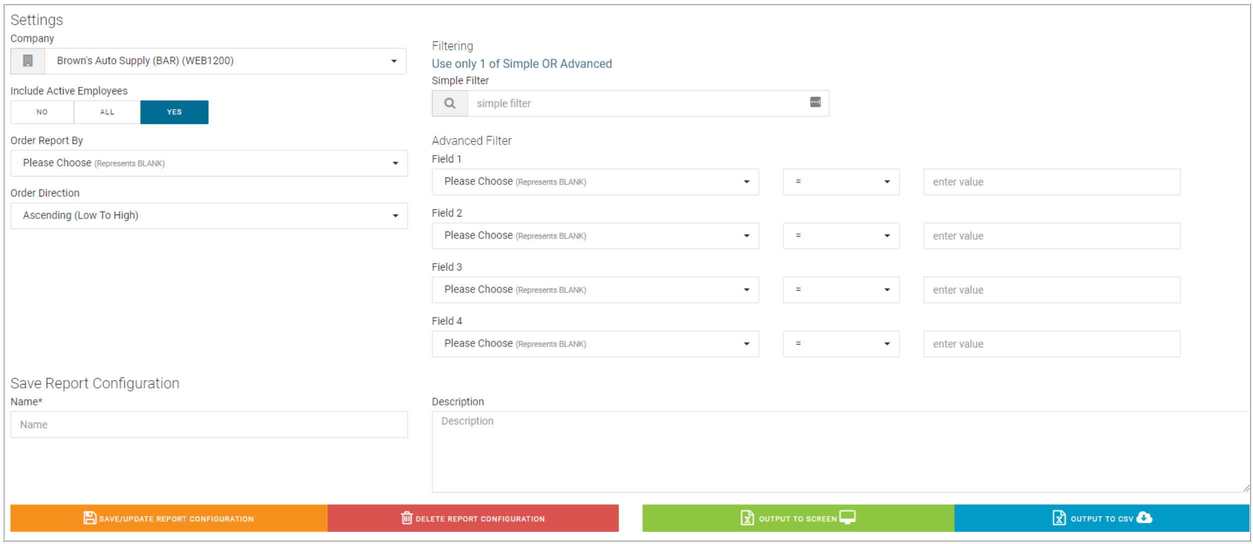
The **Users in Roles** Report displays in a separate window.

It is a sortable popup that can be printed or exported as a CSV, PDF, Excel, RTF, TIFF, Web, or XPS document.

Quick Report Writer (QRW)

The Quick Report Writer (QRW) allows you to create customized reports on selected data within Advanced HR. Note that any custom reports you create are user-specific, they cannot be shared with other users.

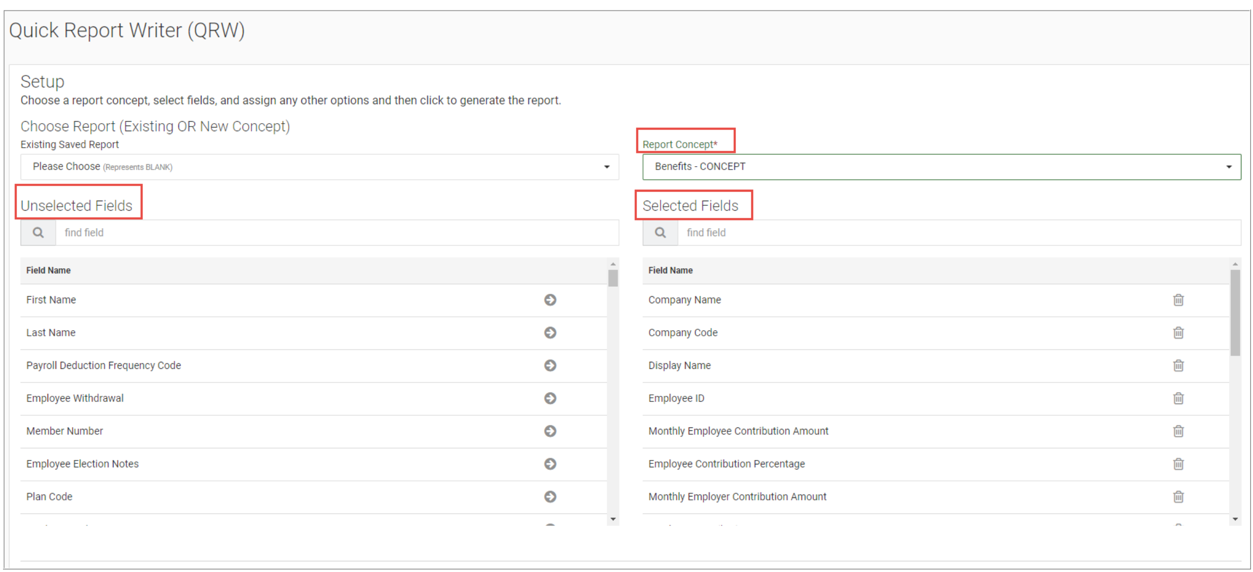




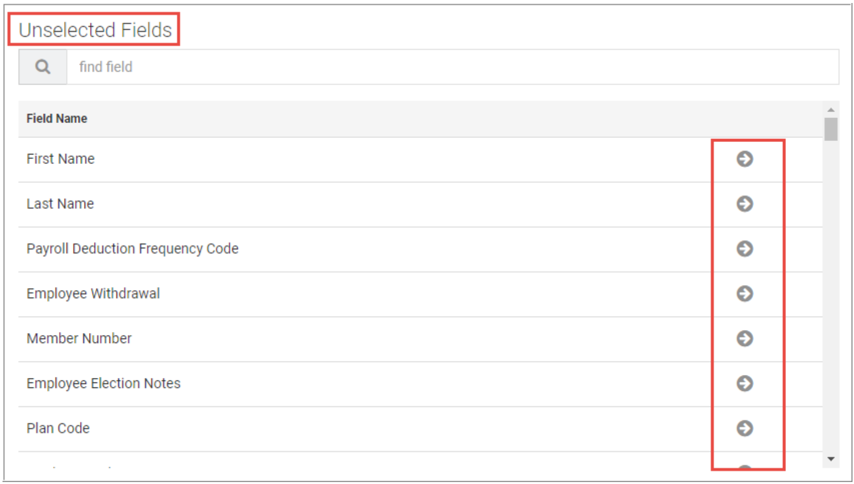
Quick Report Writer (QRW) screen

Report Concepts

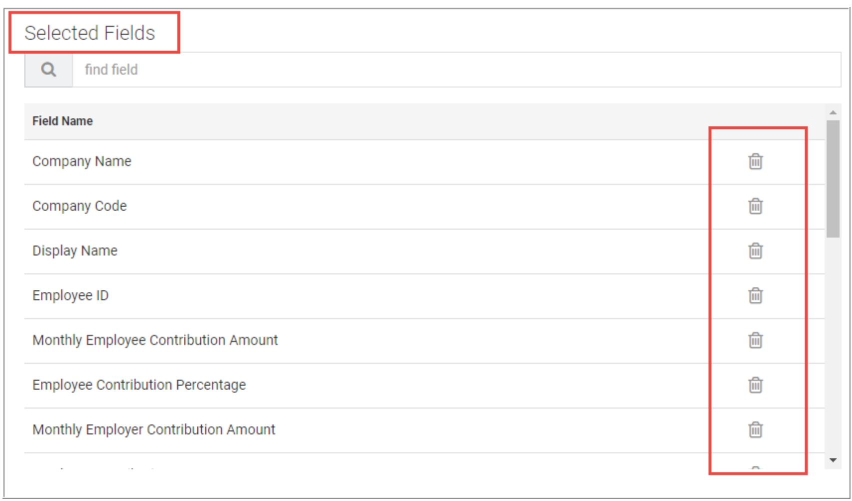
The first step in creating a custom report is to select the **Report Concept**. The report concept you choose will determine which fields are automatically selected for the report. For example, if you select the **Benefits** (or the **Benefit Details**) concept, Advanced HR would select fields that relate to benefits as you can see in the screenshot below.



Advanced HR will also display "**Unselected Fields**" (on the left side) that can be added to the selected fields list (on the right side) by clicking on the green arrow button to the right of the field name.



You can also remove a selected field by clicking on the red trash can icon.



Once you have selected the fields for your report, you can adjust the basic settings which include:

- Selecting which companies you are reporting on if you have more than one
- Reporting on only inactive employees (NO), all employees (ALL), or only active employees (YES)
- Which field you want the report to sort on and in what direction (ascending or descending).

Important: You can only select **one Report Concept at a time** for each custom report created with the Quick Report Writer tool.

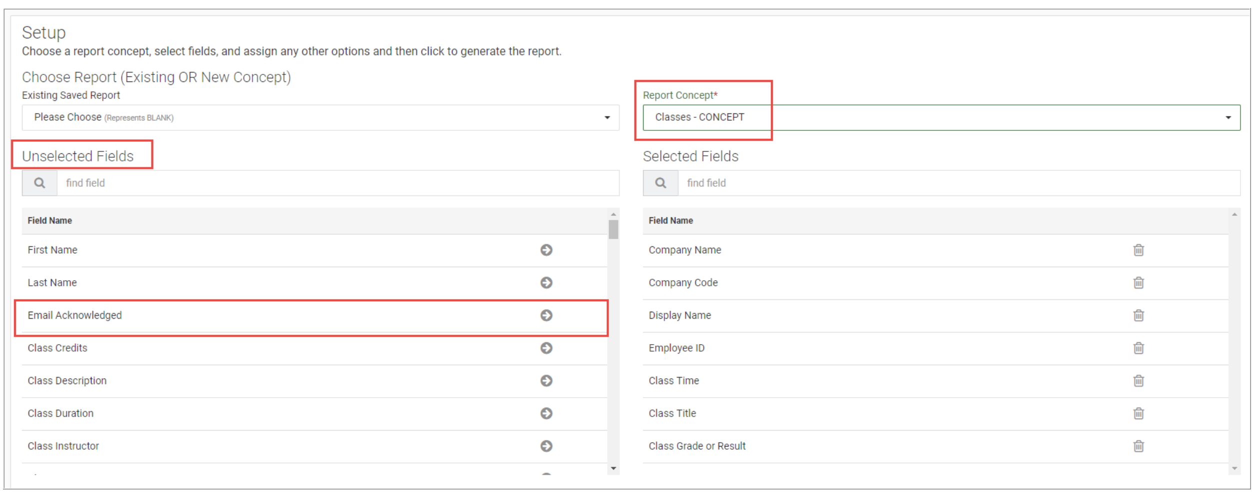
You can choose from the following Report Concepts in the dropdown:	
• Achievement	• Alternate Rate
• Applicants	• Benefit Details (note there are two Benefit concepts)
• Benefits	• Certificates

You can choose from the following Report Concepts in the dropdown:

- Classes
- Compensation
- Direct Deposits
- Education
- Emergency Contacts
- Employee
- Labor Allocation
- Licenses
- Position/Organization
- Reviews
- Skills
- Time Off

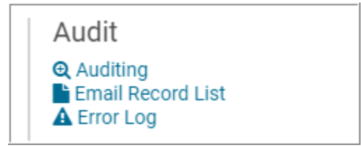
Tip: Make sure that for all users, in their Browser's settings, that pop-ups are allowed. Some Browsers may have a setting where a pop-up blocker is on by default; if so, make sure any pop-up blocker has been disabled. Otherwise, the user will not be able to see the reports.

Note: For the Licenses, Classes, Certifications, and Review concepts, we have also added an **Email Acknowledged** option in the **Unselected Fields** dropdown to let you report on whether the employee has acknowledged these emails. For example, in the Classes Concept list of Unselected Fields shown below.



Audit Menu

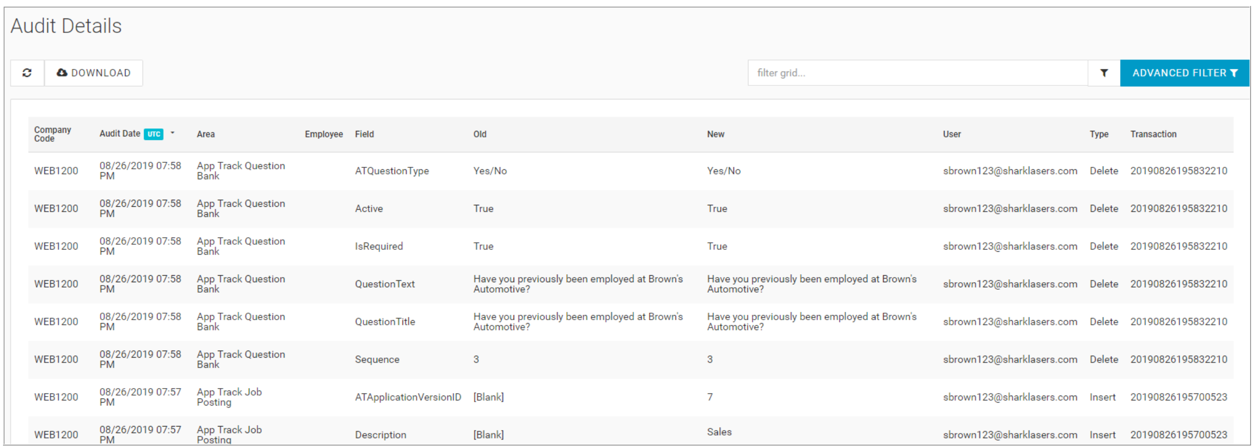
The **Audit** sub-menu on the **HR Admin** page lets you select from the following menu items:



Auditing

Advanced HR 2.0 records details on every entry made into the database. Details include the user who made the change, the date and time of the change, what area within Advanced HR 2.0 was impacted, the specific employee affected by the change, the old and new value of the fields changed, and what type of change occurred (insert or update).

This level of detail combined with the filter grids make searching for specific changes simple. You can connect multiple search criteria with a "+" sign.


Audit Details

DOWNLOAD

filter grid...

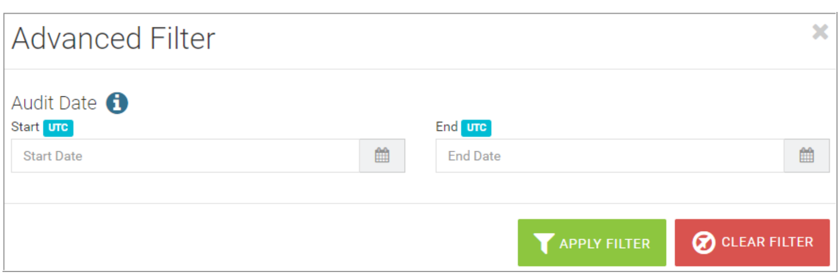
ADVANCED FILTER

Company Code	Audit Date UTC	Area	Employee	Field	Old	New	User	Type	Transaction
WEB1200	08/26/2019 07:58 PM	App Track Question Bank		ATQuestionType	Yes/No	Yes/No	sbrown123@sharklasers.com	Delete	20190826195832210
WEB1200	08/26/2019 07:58 PM	App Track Question Bank		Active	True	True	sbrown123@sharklasers.com	Delete	20190826195832210
WEB1200	08/26/2019 07:58 PM	App Track Question Bank		IsRequired	True	True	sbrown123@sharklasers.com	Delete	20190826195832210
WEB1200	08/26/2019 07:58 PM	App Track Question Bank		QuestionText	Have you previously been employed at Brown's Automotive?	Have you previously been employed at Brown's Automotive?	sbrown123@sharklasers.com	Delete	20190826195832210
WEB1200	08/26/2019 07:58 PM	App Track Question Bank		QuestionTitle	Have you previously been employed at Brown's Automotive?	Have you previously been employed at Brown's Automotive?	sbrown123@sharklasers.com	Delete	20190826195832210
WEB1200	08/26/2019 07:58 PM	App Track Question Bank		Sequence	3	3	sbrown123@sharklasers.com	Delete	20190826195832210
WEB1200	08/26/2019 07:57 PM	App Track Job Posting		ATApplicationVersionID	[Blank]	7	sbrown123@sharklasers.com	Insert	20190826195700523
WEB1200	08/26/2019 07:57 PM	App Track Job Posting		Description	[Blank]	Sales	sbrown123@sharklasers.com	Insert	20190826195700523

Audit Details screen

Advanced Filter

The **Audit Details** grid also has an advanced filter that allows you to narrow down results by a date or range of dates. Click the **Advanced Filter** button to display the **Advanced Filter** popup screen.

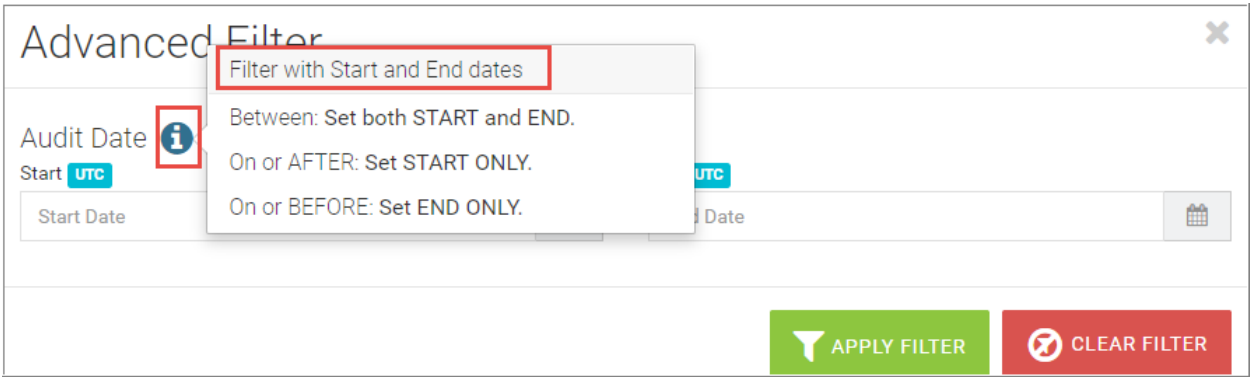


Set the **Start** and **End** date(s) to filter the results displayed as follows:

- To display a list of results between two dates, select both a **Start** and an **End** date.
- To display a list of results on or after a specific date, select a **Start** date only.
- To display a list of results on or before a specific date, select an **End** date only.

Click the **Apply Filter** button after entering the date(s) to display the results. Click the **Clear Filter** button to remove the date settings you specified (they will remain until you click the **Clear Filter** button).

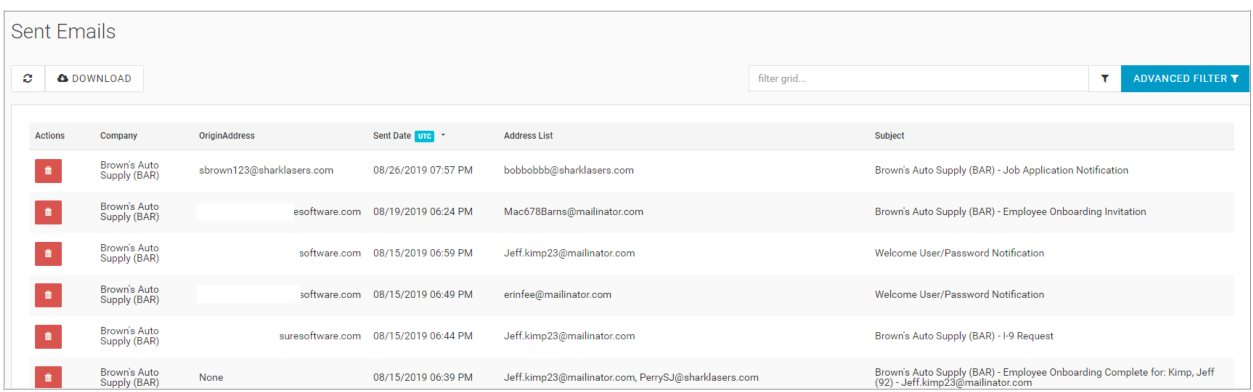
You can click on the **I** Information icon to display these rules as a Help Topic.



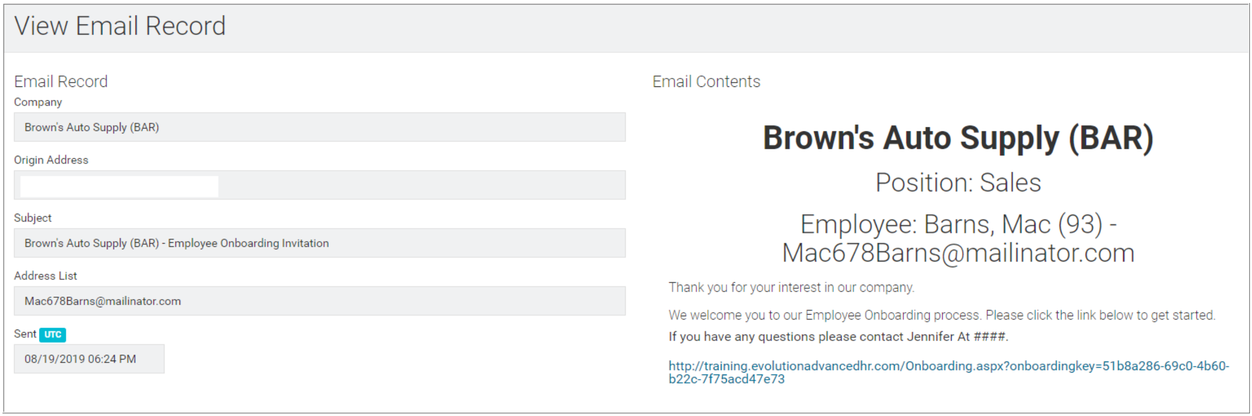
Click on the I Information icon again to hide the Help text.

Email Record List

Provides a user with the proper security the ability to review emails that have been sent from the companies which the user has access to. If no company is selected, you'll see a list of ALL emails that have been sent.

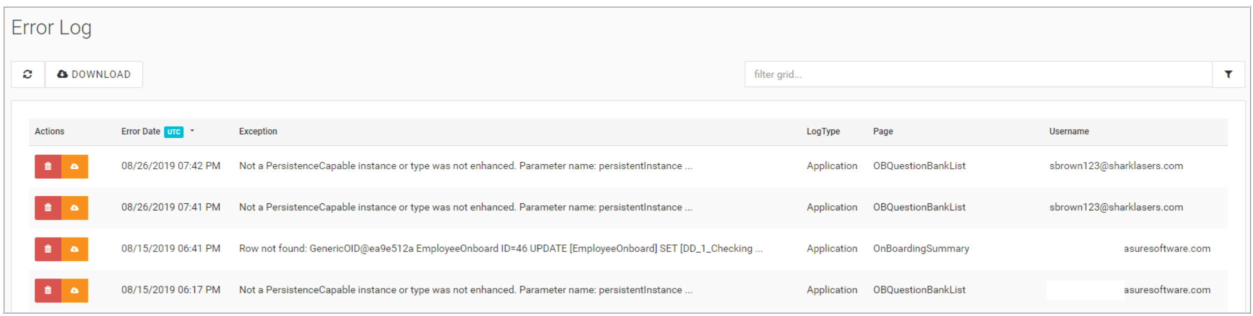


Click on the email to access a detailed view of the email.

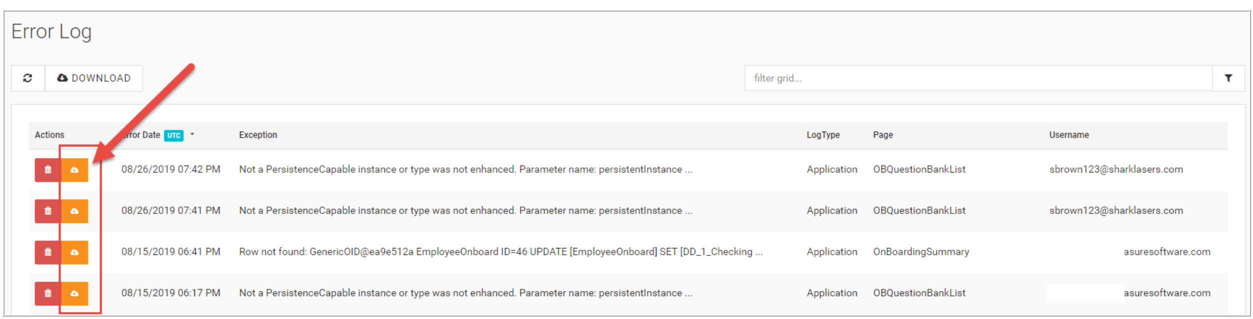


Error Log

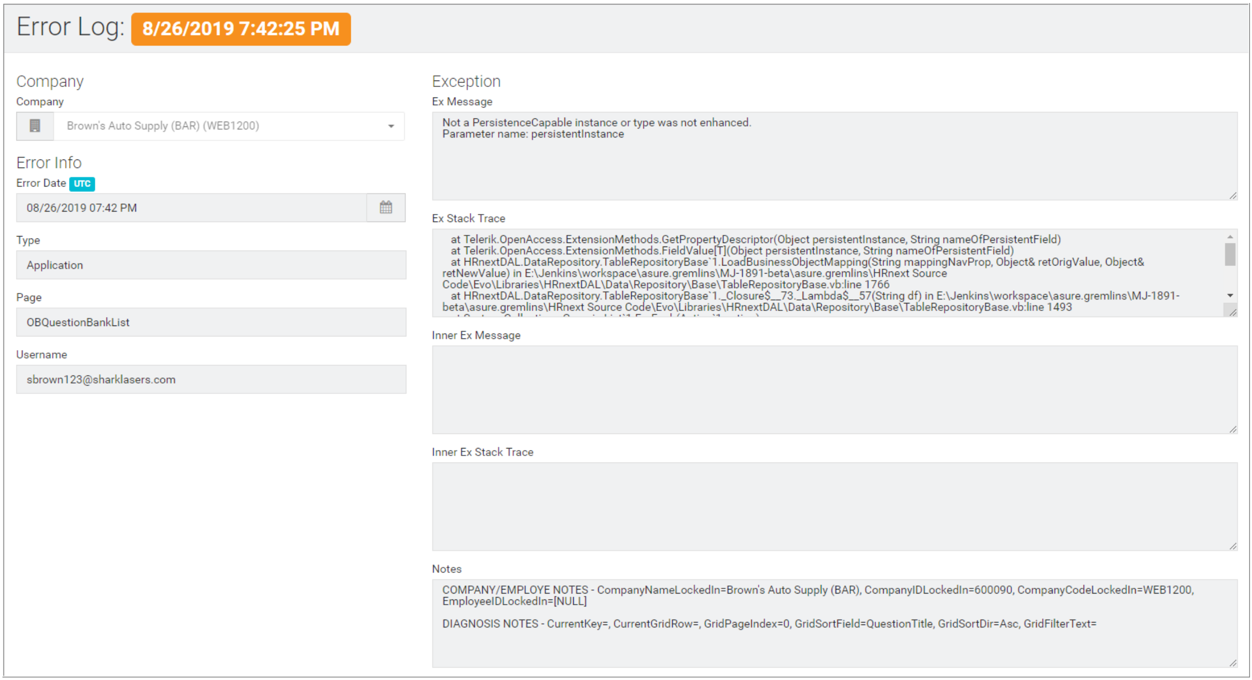
Advanced HR 2.0 also logs details of any errors that occur within the system. Although this information is very useful to our developers, it can be a bit difficult to interpret on your own! Generally it is best to contact your support representative if the system is displaying errors.



Use the **Download this Record** button  on the **Error Log** dashboard for each error log (row) on the screen to download it as a text file instead of copying and pasting from the Error Log details screen. This may be useful when talking with the Support Department about an issue.

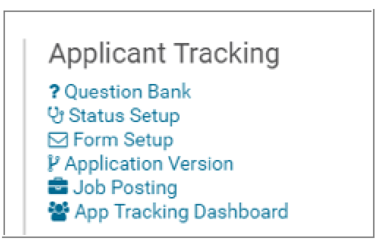


Click on an error row on the dashboard to display the **Error Log** details screen – again, note this may be difficult to interpret if you are not a developer.



Applicant Tracking Menu

The **Applicant Tracking** sub-menu on the **HR Admin** page lets you select from the following menu items:



For detailed information about how to use the **Applicant Tracking** feature, refer to the separate document: *Advanced HR 2.0 Applicant Tracking Guide*.

This section presents a brief overview of the Applicant Tracking menu items.

- **Question Bank**

  This is where you set up and edit questions used in the applicant screening process. The following response options are currently available; yes/no, date, free form text, and multiple choice.

- **Status Set-up**

  This is where you can customize the steps in the application management process. Each step is either an applicant's status (for example, New Application or New Hire Complete) or a step in your internal applicant process (for example, Interview One, Final Interview, Prep for Onboarding).

- **Form Setup**

  This is where you create your custom email communication for thanking the candidate for applying, rejecting the application, and presenting an offer.

You can also create a custom Application Certification that all candidates must agree to before submitting their applications (this is all the legal terminology at the bottom of the application that states the data being submitted is accurate, applying for a job is not an offer of employment, etc.).

Note that, with the Notifications functionality added, three Forms that were previously set up on the Form Setup screen can now be done with Applicant Tracking Notifications. See the next section.

- **Application Version**

  You have the ability to create multiple applications for different job postings. Each application is given a specific title and internal description to help distinguish between similar applications.

  This is also where you link questions in the Question Bank to the application by choosing the question and clicking on the green Link **Question** button.

- **Job Posting**

  Now that you have set up your Applicant Tracking infrastructure, you can create a job posting. This is also where you can control the status of a posting by toggling the status to **No** or **Yes**.

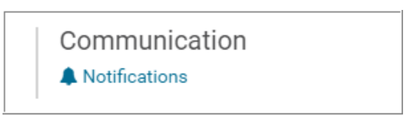
  In the **Links To** section you can link your job to specific positions, workers comp codes, and company configurations (in this example we have Job, Activity, and Material; however, your company will display whatever you have set-up in your payroll database such as Division, Location, and Department.).

- **Applicant Tracking Dashboard**

  This section provides a high-level listing of all applicants, date and time the application was completed, current application status, referral source, city/state, and any keyword responses.

Communications Menu

The **Communications** menu on the **HR Admin** screen contains the **Notifications** menu item.



Notifications Feature

Notification functionality enables you to send email messages to designated recipients. Receiving automatic notifications regarding their employees is a time saver for managers and administrators. Advanced HR 2.0 comes equipped with a full set of event-based and date-based notifications.

There are two types of Notifications:

- **Event-based notifications** operate behind the scenes and are generated automatically. No setup is required.
- However, for **date-based notifications**, there is some setup effort required by the user. All notifications have default template messages that can be edited at any time.

Event-Based Notifications

During Applicant Tracking:

- Job application notifications
- Interview workflows
- Offer letter submitted/rejected

Employee Onboarding:

- Onboarding invitation
- Completed notification
- Government compliance:I-9 assignment

Direct Deposits:

- New request notification
- Submitted thank you email
- Approved/rejected

- W-4 Form Change requests
- Time Off Requests
- Enrolling in Training Classes
- Welcome emails to employees
- Password reset emails for users

Date-Based Notifications

Employee dates:

- Hire date reminder
- Termination date reminder
- Birthday and work anniversary reminder
- Employee review date reminder

Licenses and Certifications:

- Achievement expiration date reminder
- Certificate expiration date reminder
- License expiration date reminder

Open Enrollment:

- Open Enrollment start date reminder
- Open Enrollment end date reminder

Training class reminder

All notifications come with templates that include generic wording with some logic built in. However, you can edit them with company-specific wording and logic. Depending on the Notification, you can choose the recipients to be included:

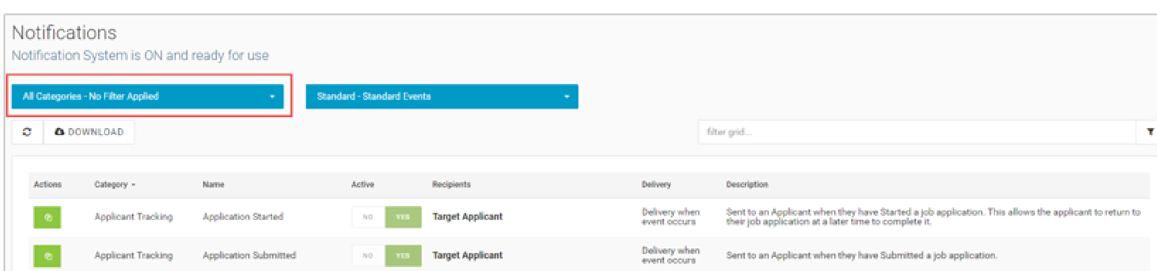
• Specific employees and/or users	• Reports To fields for managers	• Applicants and/or job candidates

You can set any Notification to be **Active** or **Inactive**. To access and/or edit Notifications, the user must have the role of **Base Admin** or higher.

Event-Based Notifications

Go to **HR Admin – Communication – Notifications**.

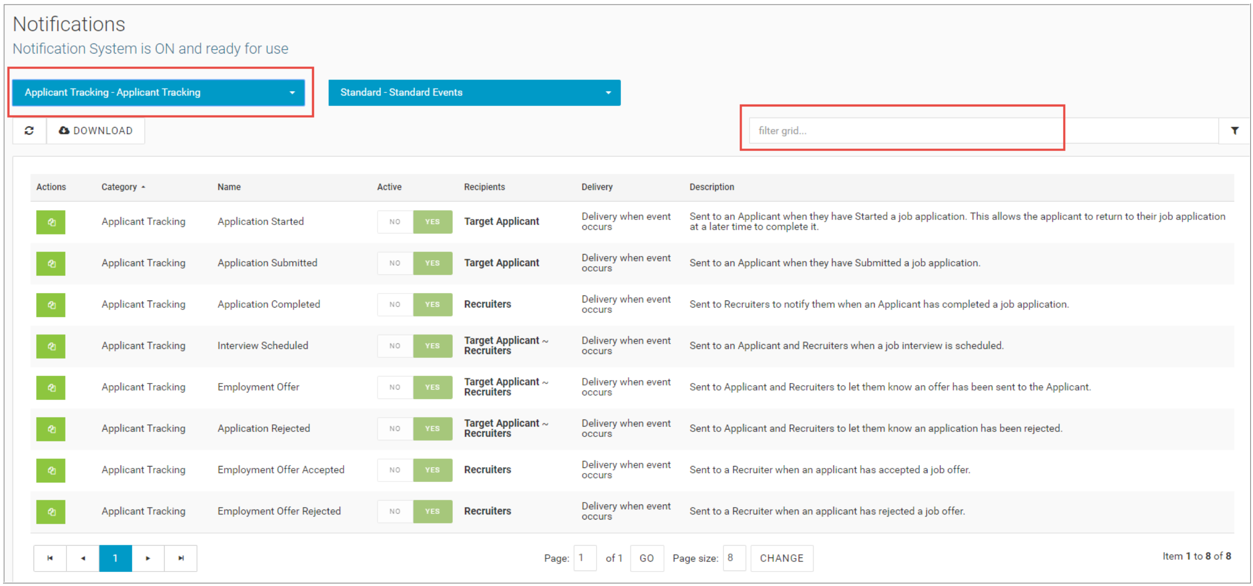
Use the blue Notification **Categories** dropdown in the upper-left to select particular categories of notifications to display**.** The default is **All Categories**.



Notifications Dashboard

Click the **Notifications** menu link, to navigate to the **Notifications** dashboard. If you are locked into a company, your view will be similar to the screenshot below. However, if you haven't selected a company, you'll see all Notifications for all the companies in the system.

The following is a sample of the Notifications dashboard screen for the **Applicant Tracking** category.

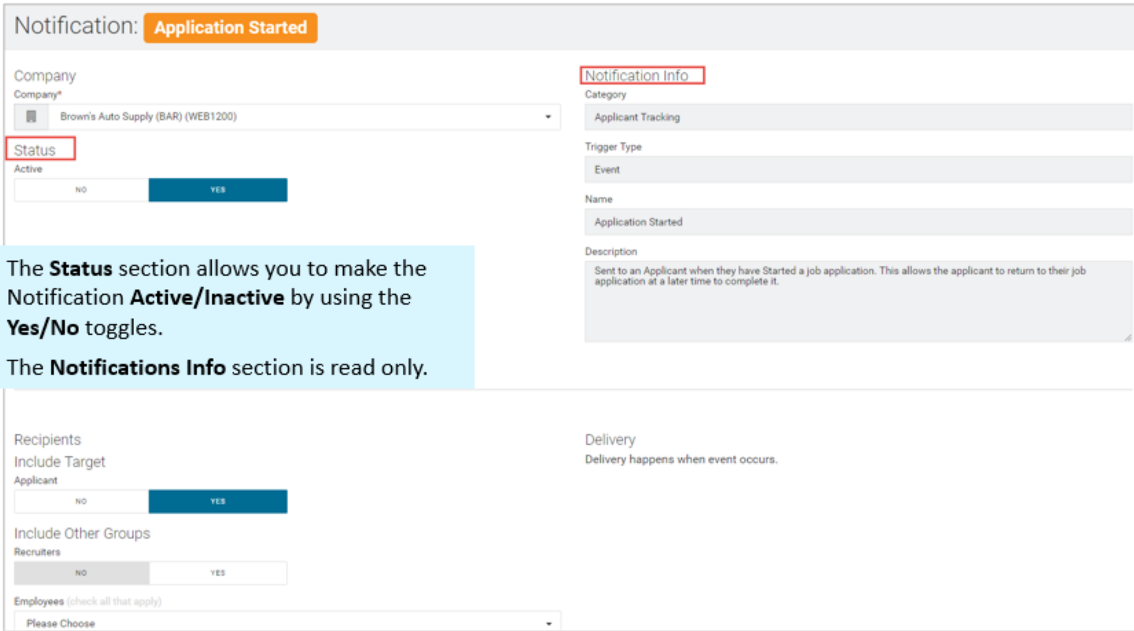


You can use the **Filter Grid** at the top-center of the screen to search for a particular Notification. In addition, you can use the blue **Notification Categories** dropdown in the upper-left corner to select a particular category of Notifications that you'd like to display. Of course, the user can also select a particular notification by clicking on its name in the grid.

The **Notifications** dashboard has the following column fields:

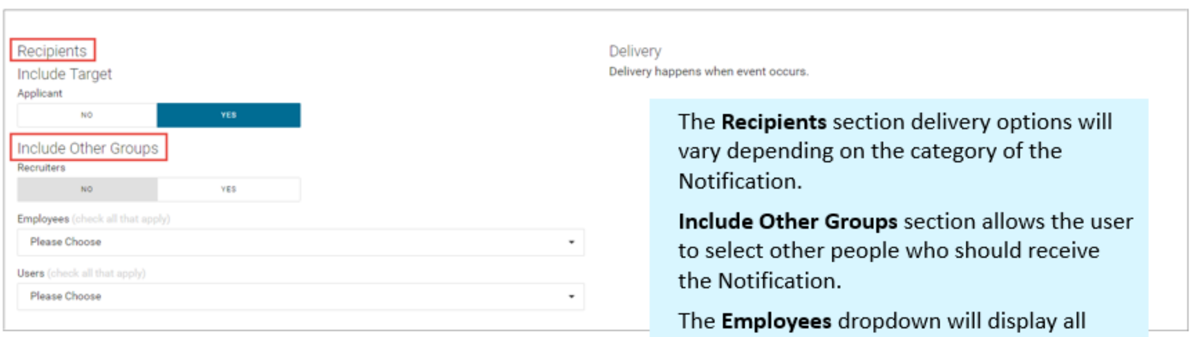
Column Field	Description
Category	The category for the notification, for example: **Applicant Tracking**, **User**, **Classes**, **Direct Deposit**, **Open Enrollment**, etc.
Name	The name of the notification.
Active	The **Yes/No** toggles indicate if the notification is **Active** or not.
Recipients	Who the targets are for the notification.
Delivery	When the notification is triggered or delivered. N/A for event-based notifications.
Description	Describes what the notification is used for.

Click on a Notification row on the dashboard to display the Details screen for a specific notification.



The **Status** section allows you to make the Notification **Active/Inactive** by using the **Yes/No** toggles.

The **Notifications Info** section is read only.



The **Recipients** section delivery options will vary depending on the category of the Notification.

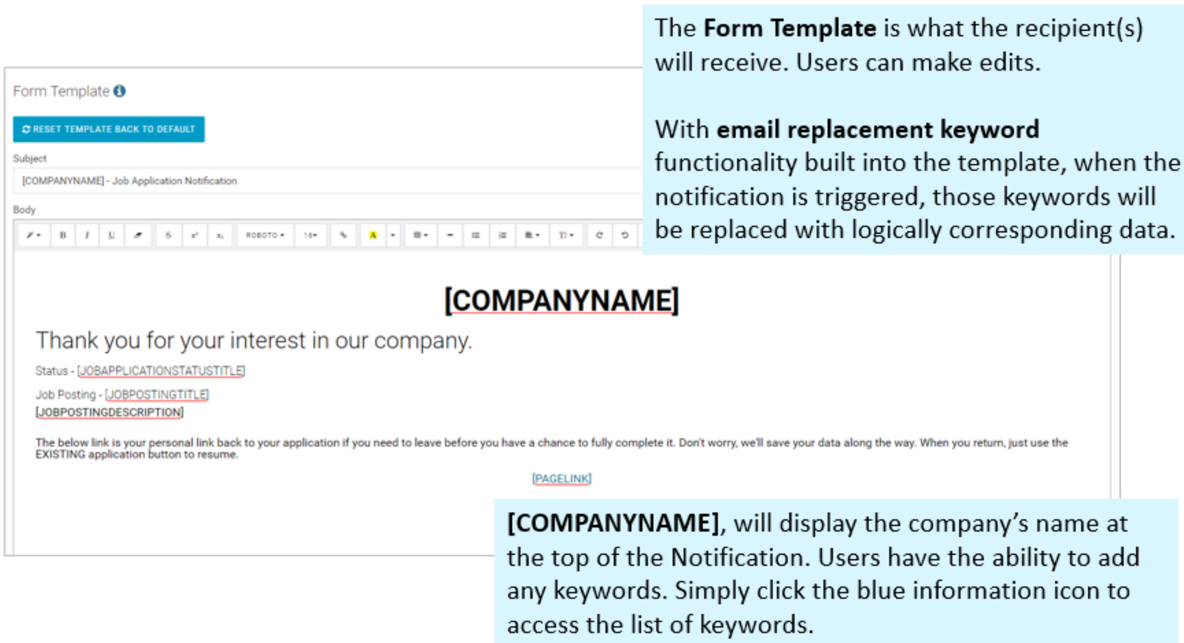
Include Other Groups section allows the user to select other people who should receive the Notification.

The **Employees** dropdown will display all employees in the system.

The **Users** dropdown is company-specific.

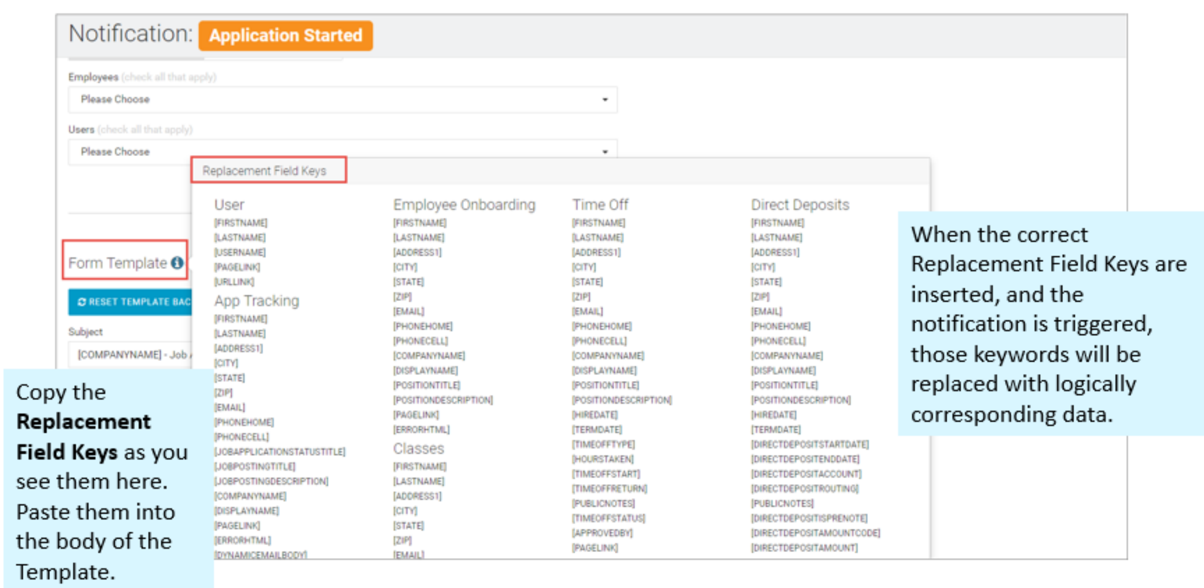
Form Template

Here is an example of a Form Email Template for an **employment offer**:



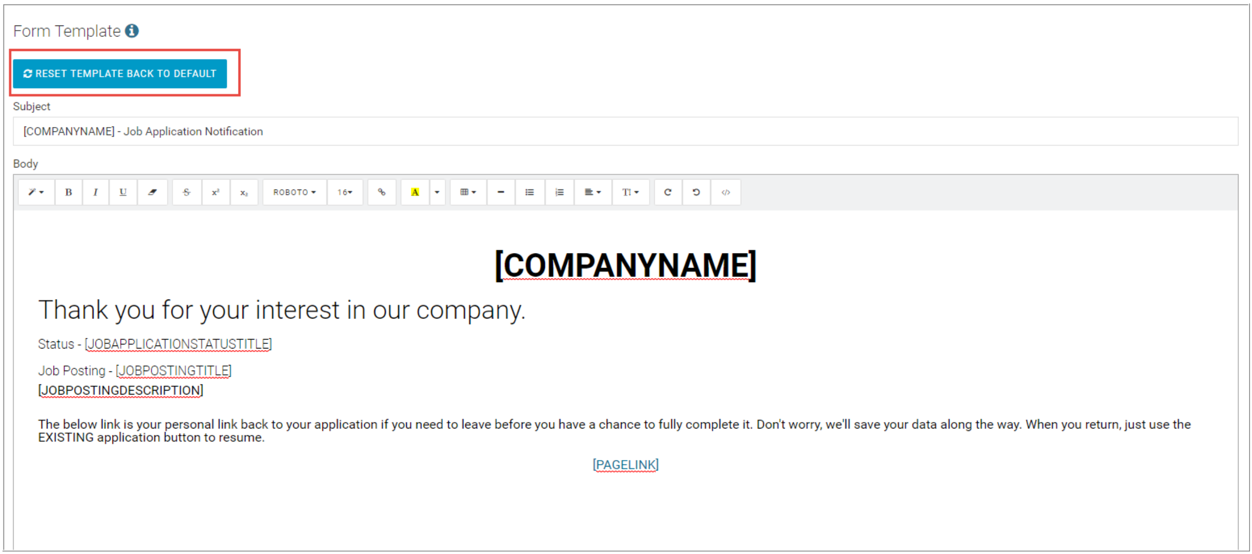
Replacement Field Keys Help

When you have a Notification details screen displayed, you can obtain a list of all the Replacement Field Keys you can use on the form template by clicking on the blue Information icon on the **Form Template** section of the screen.



If you make any undesired changes to a Notification, you can reset the template back to its default condition by clicking the **Reset Template back to default** button 

.

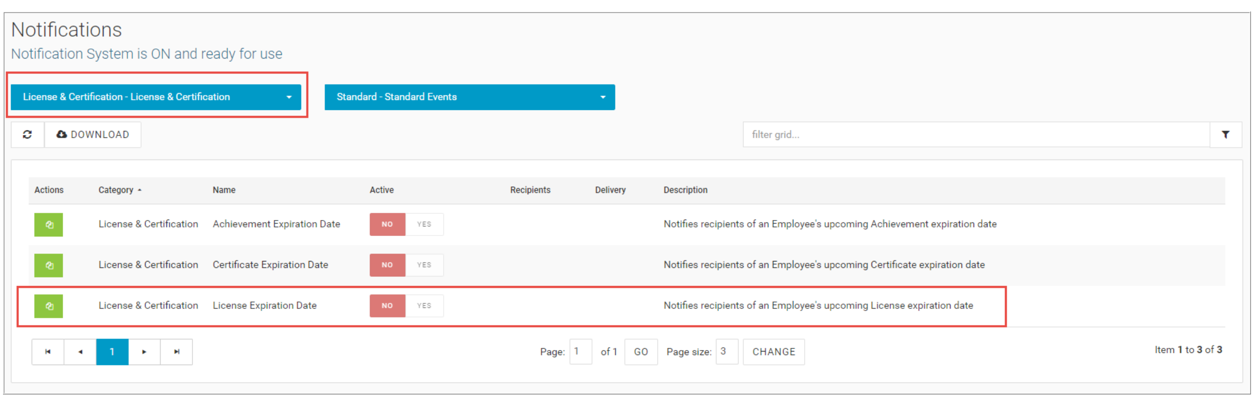


Date-Based Notifications

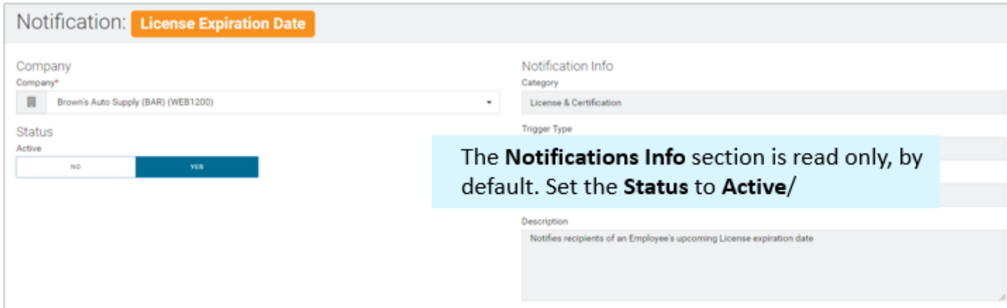
Date-Based Notifications are triggered by a date, such as for an expiring license. It's important to remember that Date-Based Notifications, unlike Event-Based Notifications, need to be set up and activated **before** they can be used. For our example, we'll use the License Expiration Date Reminder Notification.

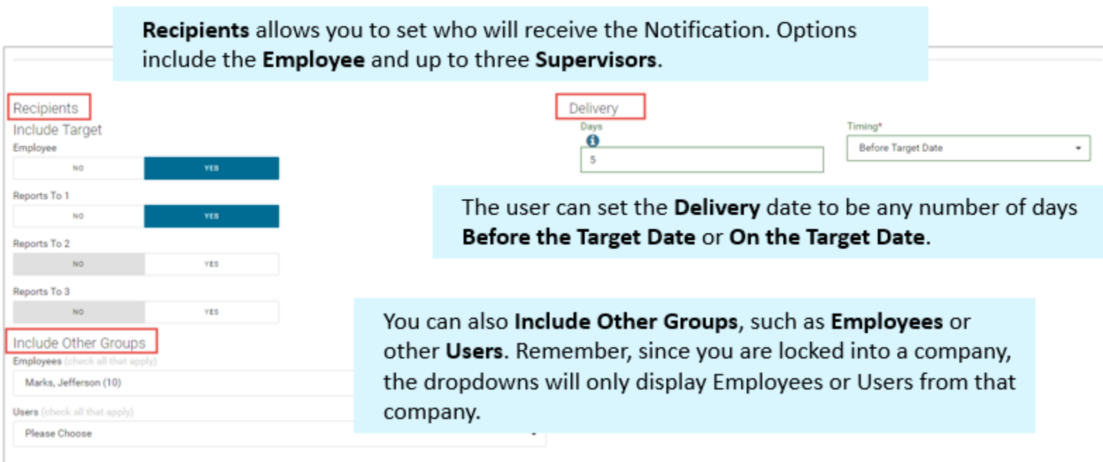
Go to **HR Admin - Communication - Notifications**. You'll be taken to the Notifications dashboard. Using the blue All Categories dropdown, select **License and Certification** 

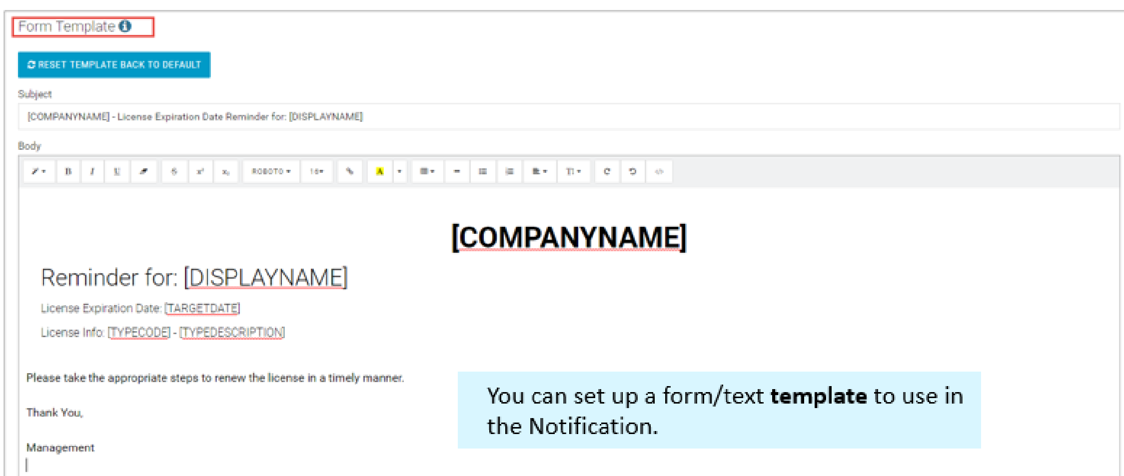
.



Click on the **License Expiration Date** Reminder to open it. Once opened, you can set it up and activate it. When you first open it, you'll notice that all the **Yes/No** toggles are set to **No**. However, let's add some functionality:







Note the **Form Template** above. As previously discussed, the Form Template is what the recipient(s) will receive. Note that in the above example, we added some text to the template. Remember, templates can be edited at any time. In addition, with email replacement keyword functionality built into the template, when the Notification is triggered, those keywords will be replaced with the logically corresponding data.

Remember to click the green **Save Changes** button when complete.

The following table describes all the fields on the **Notifications** screen when creating a **date-based** notification.

Date-Based Notification Fields	
Field / Button	Description
Company	The company the notification is for.
Status - Active	Use the **Yes/No** toggles to make the notification **Active** or not.
Category	The category for the notification, for example: **Applicant Tracking**, **User**, **Classes**, **Direct Deposit**, **Open Enrollment,** etc.
Trigger Type	**Date** or **Event**.
Name	The name of the notification.
Description	Describes what the notification is used for.
Recipients	Who the targets are for the notification.
Include Target	For example – **Applicant** for an Application Started notification, select **Yes/No**.
Delivery	When the notification is triggered or delivered. N/A for event-based notifications. This is the number of days "BEFORE Target Date" is reached when the reminder event should be triggered. A value of **0** (zero) or BLANK should be used for the timing option "ON Target Date". Note the related **Timing** field below. For **Date-Based Notifications**, the two fields below will display:
Days	Enter a number of days, then select the **Timing** value below.
Timing	Choose one of these from the **Timing** dropdown, either: • **Before Target Date** • **On Target Date**

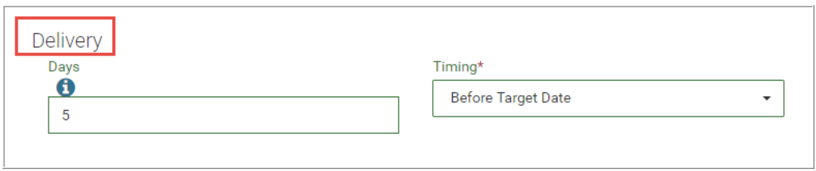
Delivery Section of the Notification Screen and the Target Date

You can set the date that the Notification is sent in the **Delivery** section of the **Notification** screen, using the following two fields:

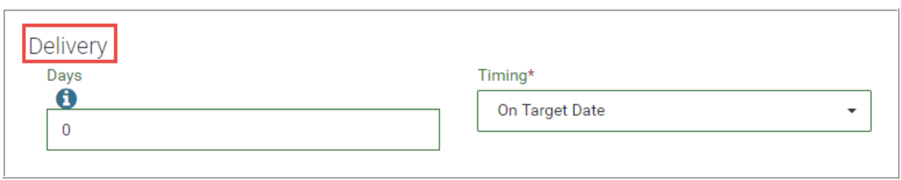
- **Days**
- **Timing**

You have the option to set it to a number of days before the event or, to send on the target (or trigger) date.

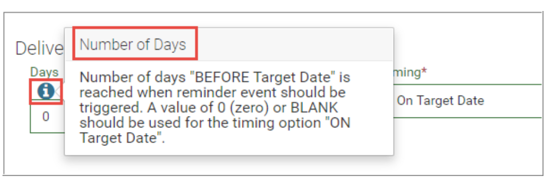
In the **Days** field, enter the number of days before the target date if you select the **Timing** dropdown option of **Before Target Date**. If the **Days** field is set to “**5**” and the **Timing** field is set to **Before Target Date** then the system will send the notification five days before the employee’s birthday.



If you want to have the reminder sent on the Target Date (the employee’s birthday) rather than x number of days before the employee’s birthday, then set the **Days** field set to zero (**0**) or blank, and set the **Timing** field to **On Target Date** as shown below.



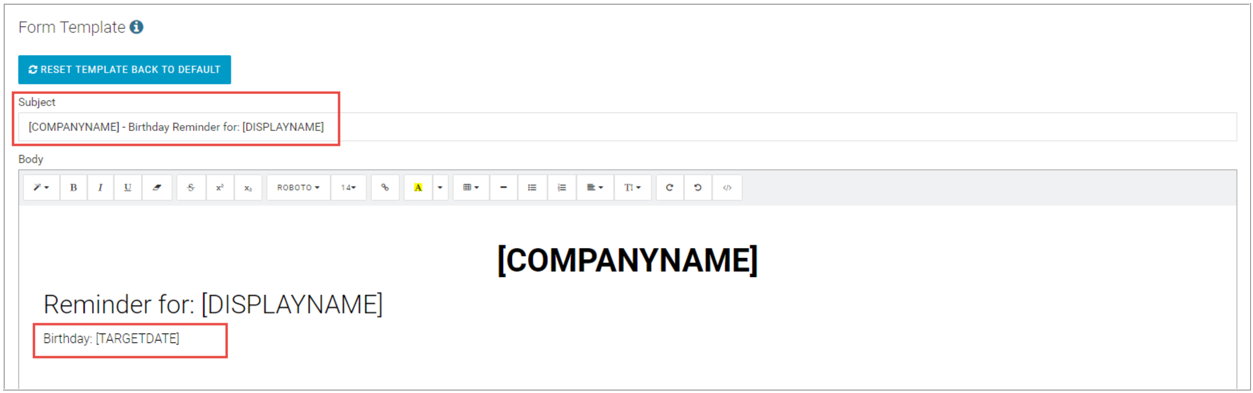
Note the Information icon below the **Days** field. Click on the icon to display the Help text for the field.



Click on the Information icon again to hide the Help text.

The [TargetDate] Keyword on the Notification Template

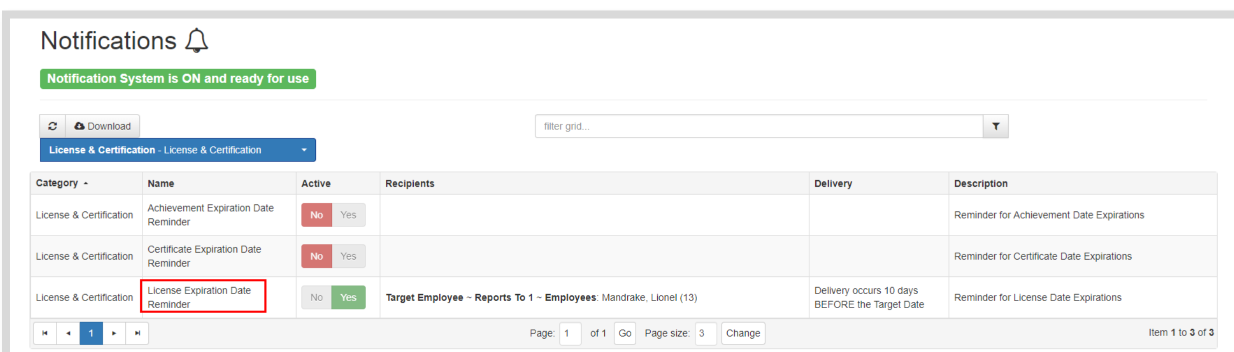
Note also that on the Form Template for a Birthday Notification, for example, there is a **Birthday** Keyword field “[TARGETDATE]” as shown below.



In this case, the **Targetdate** keyword on the template is the date the notification is triggered to send on. So, if you were to set a birthday notification to send today, the **Targetdate** field on the notification template will be populated with today’s date. For the Birthday notification, it’s important to keep in mind that, if you want the actual Birthday to be in the text of the notification, using the **On Target Date** field in the **Delivery** section can help if you set the notification to send on the Birthday and not using the **Days Before Target Date** setting.

Example: An email is set to run **5** days before the target date of **05/01/19**. In this example, if my date of birth is 5/1, the notification will send on 4/26 and the targetdate on the email would populate with the date of **4/26**.

From the Notifications dashboard, we can see the specifics of our newly activated License Expiration Date Reminder:



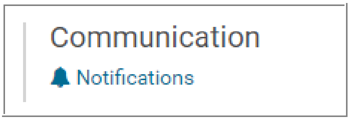
The Notification has now been setup; note the specific values in the **Recipients** and **Delivery** fields.

Cloning Standard Notifications to Create a Custom Notification

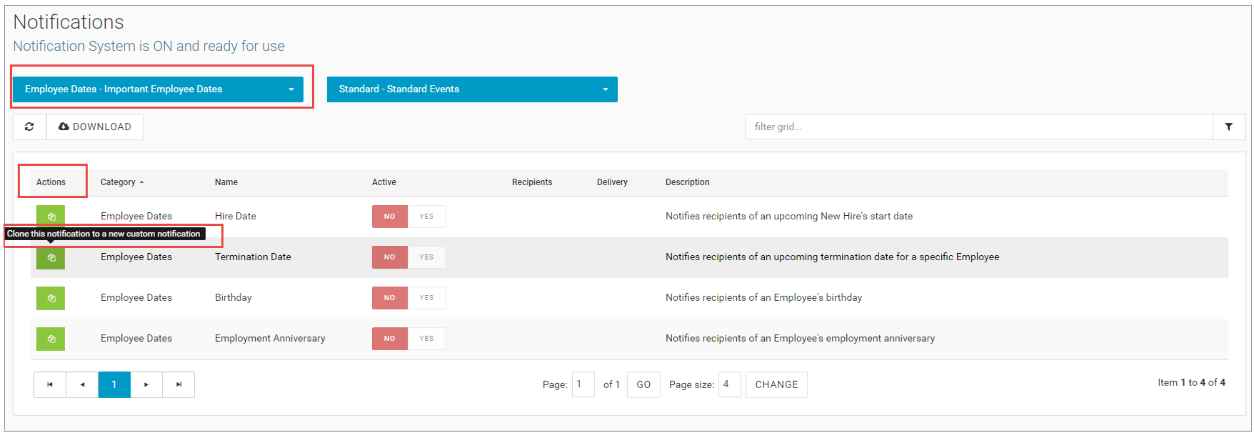
Notifications can be cloned and customized to perform a particular function. For example, Hire Date Notifications typically go to the new employee. However, you can clone this notification and have it go to the new hire’s supervisor with specific instructions. To illustrate this example, let’s walk through the process.

To copy a notification to make a custom notification:

1. Go to **HR Admin – Communications – Notifications**.

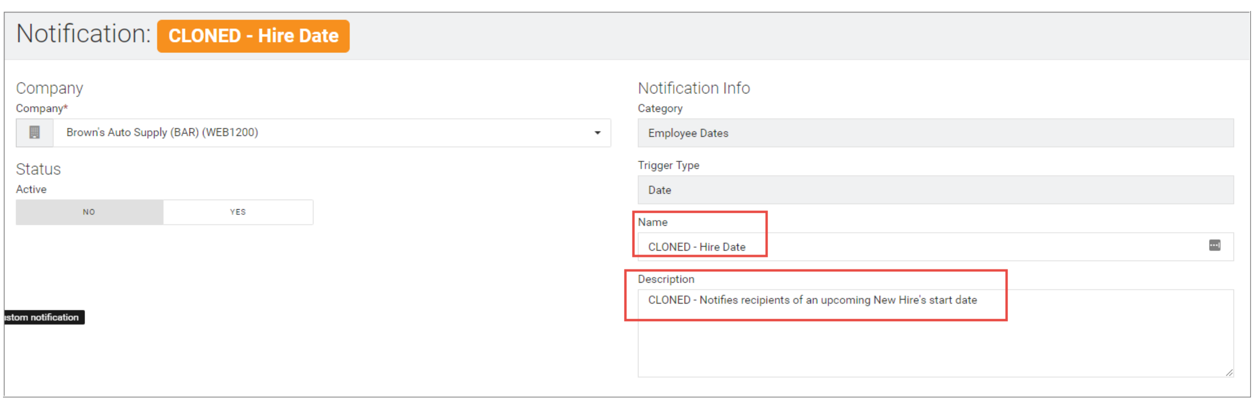


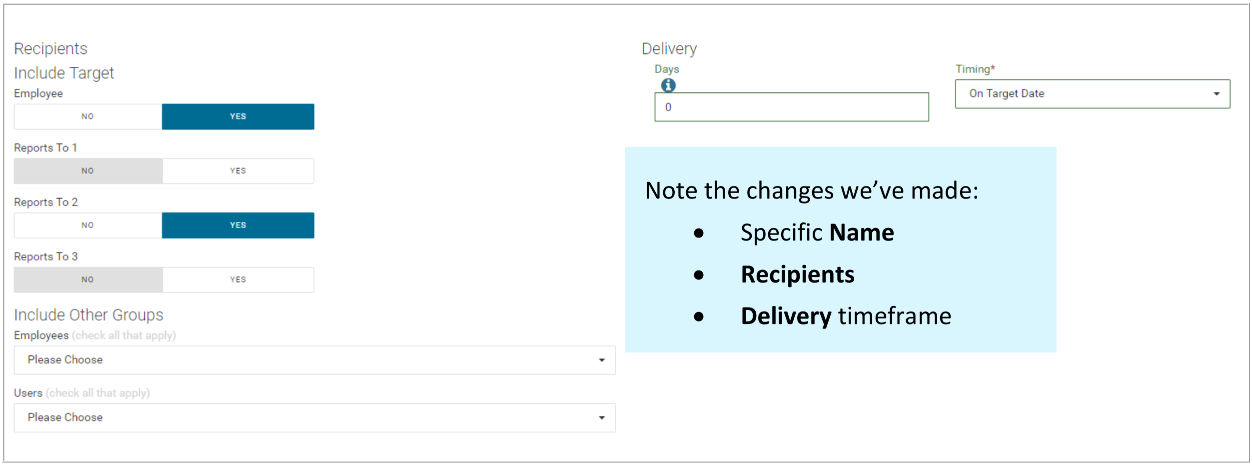
2. The system displays the **Notifications** dashboard. Use the Category dropdown to select the category of the notification, for example: **Employee Dates**.



3. In the **Actions** column, click on the green **Copy** button to clone the notification. A Notification popup will open, allowing the user to customize this notification for a specific purpose. Remember, the cloned notification is an exact copy with all the same parameters of the original one. Let's customize the **Cloned Hire Date Notification**.
4. The system displays the details screen for that Notification, for example, the Hire Date notification.

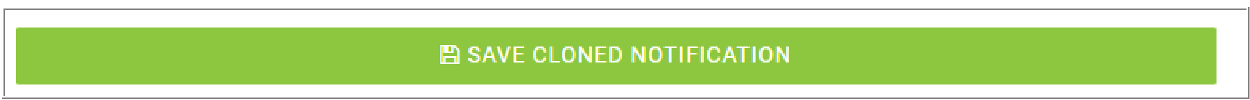
Note that the system displays "CLONED" in the **Name** and **Description** fields.





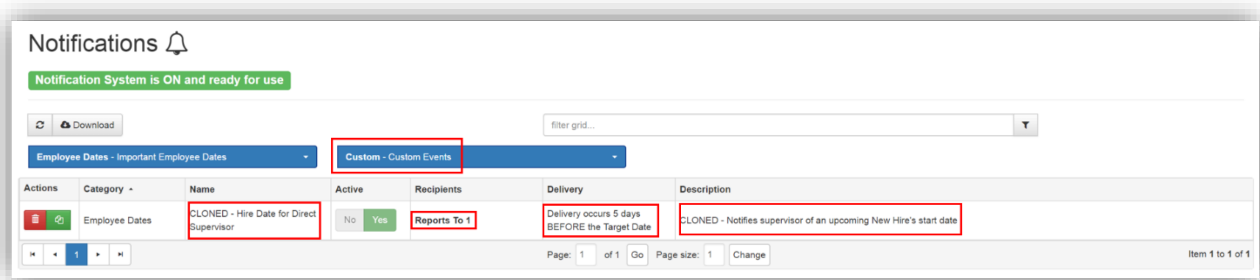
The above example shows the edited notification that will be received by the new hire's direct supervisor. Note the specific instructions with corresponding keyword logic.

5. Click the **Save Cloned Notification** button when complete.



Best Practice is to indicate the purpose of the new version of the notification in the **Name** and **Description** fields, in addition to using the "Cloned" text.

Once saved, you are taken back to the Notifications dashboard:



In the above example, this notification reflects our edits. It will be automatically sent to the **Direct Supervisor, 5 days before the Target Date**.

Note that the Standard notifications events can be made Inactive; they cannot be deleted. Custom notification events, however, can be deleted (click the trash can icon in the **Actions** column).

List of Notifications

The following table is a list of the available notifications organized by category. **Note:** You must have **Base Admin** or higher security role to access/edit the Notifications.

Category	Name	Description
Applicant Tracking	Application Started	Sent to an Applicant when they have started a job application. This allows the applicant to return to their job application at a later time to complete it.
	Application Submitted	Sent to an Applicant when they Submitted a job application.
	Application Completed	Sent to Recruiters to Notify them when an applicant has completed a job application.
	Interview Scheduled	Sent to an Applicant and Recruiters when a job interview is scheduled.
	Employment Offer	Sent to an Applicant and Recruiters to let them know an offer has been sent to the Applicant.
	Application Rejected	Sent to an Applicant and Recruiters to let them know an application has been rejected.
	Employment Offer Accepted	Sent to a Recruiter when an Applicant has accepted a job offer.
	Employment Offer Rejected	Sent to a Recruiter when an Applicant has rejected a job offer.
Classes	Enrollment in Class	Confirmation email sent to Employee when they successfully enrolled or were enrolled by an Admin/Manager in a Class.
	Class Date Reminder	Notifies recipients of an Employee's upcoming Class date.
Compliance	I-9 Assignment	Employee being asked to complete I-9 document
Direct Deposit	Request Submitted	Sent to the Employee to let them know their request is successfully submitted.
	New Request	Sent to the people responsible to review and approve new direct deposit requests when they are submitted.
	Request Rejected	Sent to the Employee to let them know their direct deposit request is rejected.
	Request Approved	Sent to the Employee to let them know their direct deposit request is approved.
Employee Dates	Hire Date Reminder	Notifies recipients of an upcoming New Hire's start date.
	Termination Date Reminder	Notifies recipients of an upcoming termination date for a specific employee.
	Birthday Reminder	Notifies recipients of an Employee's birthday
	Employee Anniversary Reminder	Notifies recipients of an Employee's employment anniversary.

Category	Name	Description
Employee Onboarding	Employee Onboarding Invitation	Invitation to new Employee to begin Onboarding process
	Employee Onboarding Complete Notification	Employee Onboarding process has been completed by the Employee
Employee Review	Review Date Reminder	Notifies recipients of an Employee's upcoming Performance Review date
Employee W-4: W-4 Submission & Approval	W-4 Submitted for Approval	Notifies recipients of an Employee's W-4 submitted for approval.
(used for the W-4 Form change request feature)	W-4 Approved	Notifies recipients of an Employee's W-4 has been approved.
	W-4 Rejected	Notifies recipients of an Employee's W-4 has been rejected.
License & Certification	Achievement Expiration Date Reminder	Notifies recipients of an Employee's upcoming Achievement expiration date.
	Certificate Expiration Date Reminder	Notifies recipients of an Employee's upcoming Certificate expiration date.
	License Expiration Date Reminder	Notifies recipients of an Employee's upcoming License expiration date.
Open Enrollment	Open Enrollment Start Date Reminder	Notifies recipients of Open Enrollment Start Date
	Open Enrollment End Date Reminder	Notifies recipients of Open Enrollment End Date
Time Off	Time Off Request – New/Pending	New Time Off Request and/or Status of Pending
(Used for the Time Off	Time Off Request – Cancellation	Time Off Cancellation Request
Accrual feature)	Time Off Request – Approved	Time Off Approved Request
	Time Off Request – Rejected	Time Off Rejected Request
User	New User Welcome	New User/Password notification.
	Reset Password	User Reset Password notification and link to Reset process.

Benefits Menu

Advanced HR Benefits functionality is being built in phases. The main functionality in phase one allows you to set up and manage multiple benefit plans that can be assigned to employees. Once an employee is assigned a benefit their deductions are automatically set up in payroll. Recently, support for Open Enrollment and for Basic Life plans have been added in phase two. Later phases added STD/LTD support.

The first two menu items on the **Benefits** pane – **Plan/Policy** and **Employee Benefit** are the locations that HR Administrators use to set up benefit plans and for employee benefit tracking.

Note: For more information on how to set up and use benefits, please refer to the separate document: *Advanced HR 2.0 Benefits Guide*.

Time Clock

This section provides an overview for the Administrator of how to set up integration with the Timeclock Time & Attendance Management application and Advanced HR 2.0. This is a two-step process; you need to first set up the TimeClock configuration and then set up the user credentials.

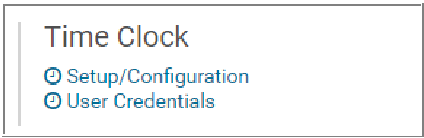
Time Clock Integration steps (High Level Steps – details below in the next section):

- Set up the TimeClock configuration
    - Set up the client level username and password
- Set up the user credentials
    - All employees must have a time clock credential setup

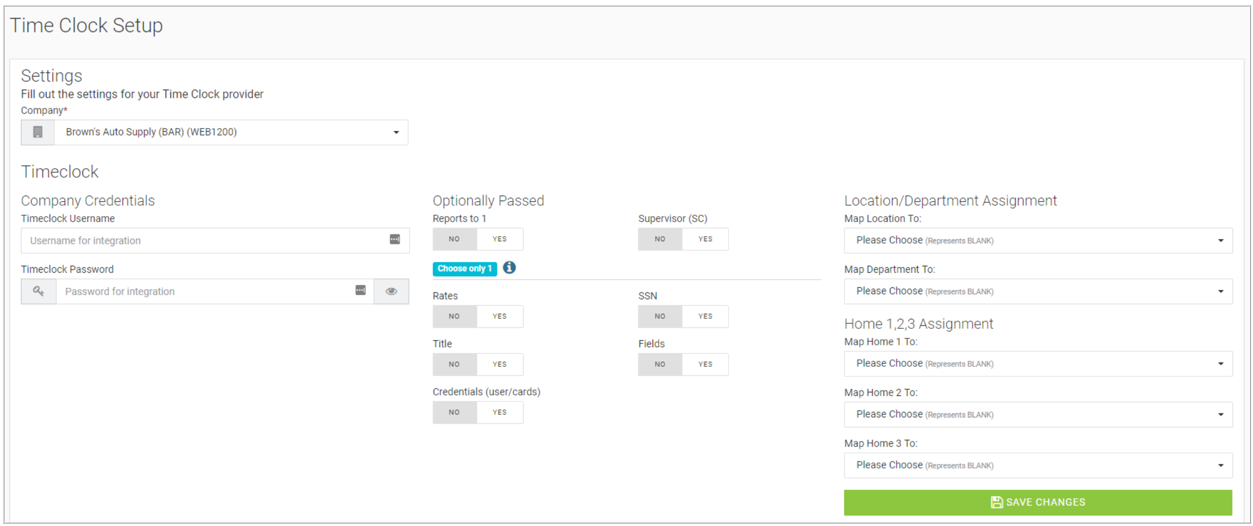
Setting Up the Time Clock Configuration

To set up the Time Clock Configuration, the Administrator does the following steps in Advanced HR:

1. Go to **HR Admin – Time Clock – Setup/Configuration**.



2. The system displays the **Time Clock Settings** screen.



3. Select the **Company**, if not already selected.

4. In the **Company Credentials** section, enter the **Admin** level Username and Password in the **Timeclock Username** and **Timeclock Password** fields. The User should be an **Account Type** of **Client** in the time system.

5. In the **Optionally Passed** section of the screen, use the **Yes/No** toggles to select which representation of "Supervisor" you want to be integrated to the Timeclock provider. The options are:

   - **Reports to 1** option (the regular 'reports to' supervisor), or the
   - **Supervisor (SC)** (the Timeclock provider supervisor) option

   You can select one or the other of these options, not both.

   These fields are part of the Employee Position Organization record.

6. Using the **Yes/No** toggles, select which items you want to flow between Advanced HR and the Timeclock provider:

   - **Rates**
   - **SSN**
   - **Title**
   - **Blank Fields** (Memo Fields)

- **Credentials** (user/punch cards)

7. If you optionally want to enable DBDT (organization) mapping between Advanced HR and the Timeclock provider, complete the DBDT information in the **Location/Department Assignment** and the **Home 1, 2, 3 Assignment** sections of the screen.

8. Click the **Save Changes** button at the bottom of the screen.

Note: The **Credentials** (user/punch cards) toggle will allow the user's the Timeclock provider SSO user to be created in Advanced HR and then synced to the Timeclock provider. This eliminates the requirement to create user sign ins in the Timeclock provider.

Setting Up the TimeClock User Credentials

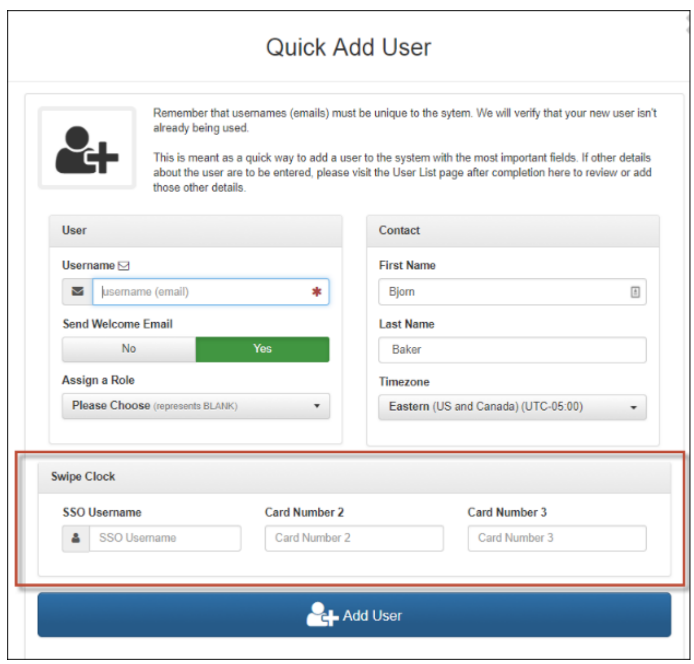
Once a Service Bureau/Client has set up the TimeClock configuration (see above step), the users will also need to be setup. **TimeClock User Credentials** can be set up in two ways. Each process is based on when in the Setup of the Client TimeClock is configured. Each method is described below.

TimeClock User Credentials from Quick Add User

Using the **Quick Add User** screen is preferred when setting up a new hire during the Onboarding process, or when setting up users after the Payroll Data Cutover Process.

Click the **Quick User Add** button, from within the Onboarding process or from the **Employee Summary**. In the **Time Clock** section, enter the user's TimeClock provider **SSO Username** and optionally, enter any additional user punch cards (**Card Numbers**).

Note: If new hire or user is not in TimeClock if **Credentials** (user/punch cards) is marked **Yes,** then you can create the **SSO username** here and it will send to the TimeClock provider, using the sync option.



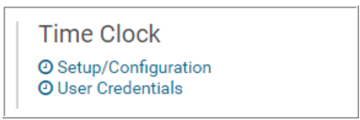
If the Employee user is also a TimeClock Admin, please see the section on TimeClock Admin setup.

Creating TimeClock User after Advanced HR User was Created

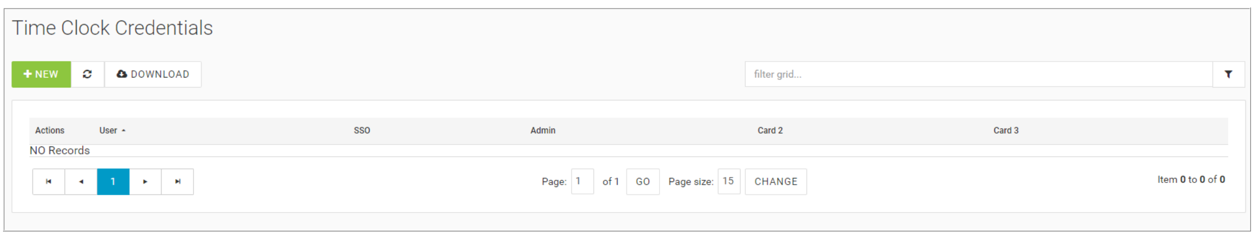
If the TimeClock user was not setup from the **User Quick Add**, the Advanced HR user must be created first, then you can link this user and add the TimeClock user.

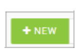
Note: Depending on the setup in **Time Clock – Setup/Configuration, Credentials** (user/punch cards), if SwipeClock users need to be created in SwipeClock prior to this setup he.

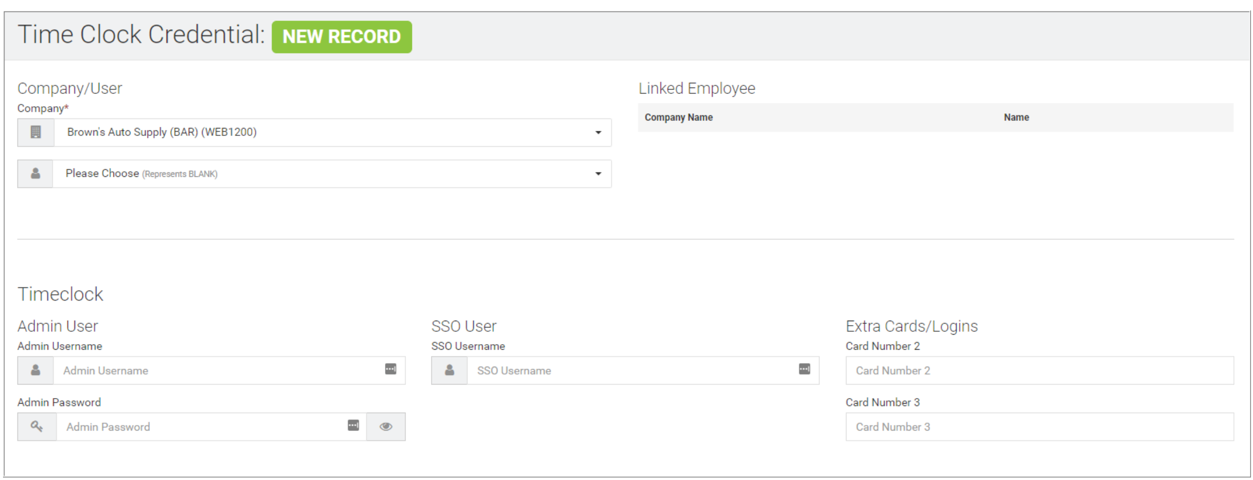
1. Go to **HR Admin – Time Clock – User Credentials**.



2. The system displays the **Time Clock Credentials** screen.



3. Click on the **+ New** button  to add a record.



4. In the **Timeclock Admin User** section, enter the **Admin's Username** and **Admin Password**. Not all Employees will have an Admin Username. These are reserved for Supervisors or Managers (Someone that will manage other employee's TimeClock punches).

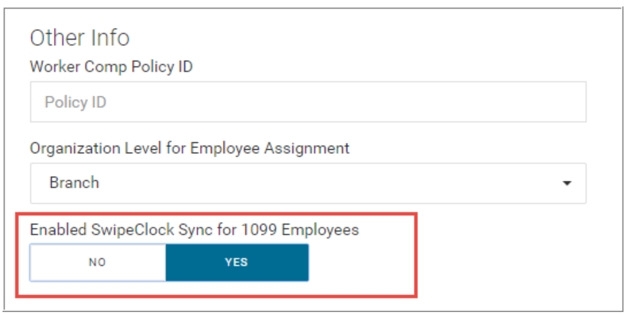
5. Enter the user's **SSO Username**.
6. Optionally, if the user will have additional punch cards/logins, enter these in the **Extra Cards/Logins** section, in the **Card Number 2** and **Card Number 3** fields.
7. Click **Save Changes**.

Syncing the Employee to the TimeClock Employee Record

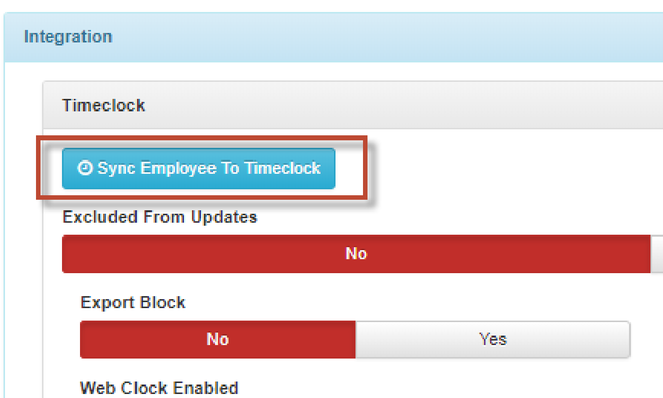
Once the TimeClock Configuration is complete, the system will automatically send a sync to Timeclock of any new Employee data changes. You can also use the **Sync Employee to Swipe Clock** button as a manual option for this purpose in the system.

Setup

An **Enabled TimeClock Sync for 1099 Employees** Yes/No toggle button is in the **HR Admin** - **Company List** screen – **Other Info** section.



The **Sync Employee to Timeclock** option button will be added to the **HR Admin – Employee Maintenance** - **Employee Summary** screen if the above option is set to **Yes**.

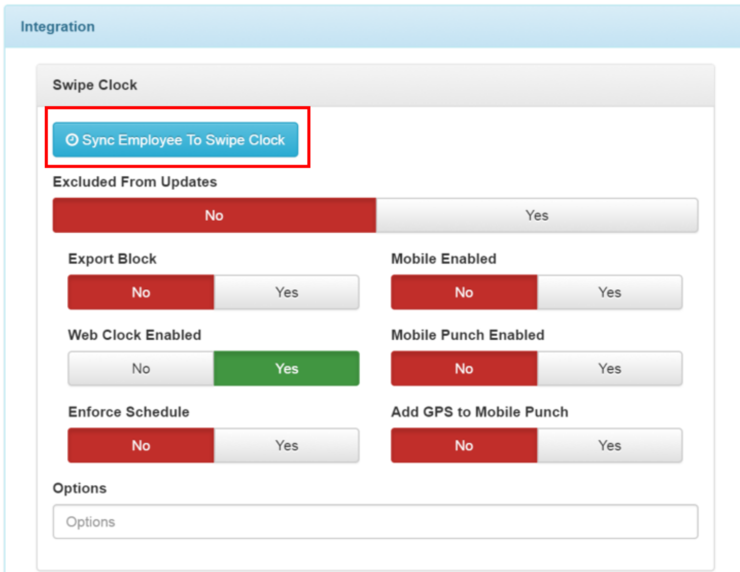


The **Sync Employee to TimeClock** button is a manual option for this purpose in the system.

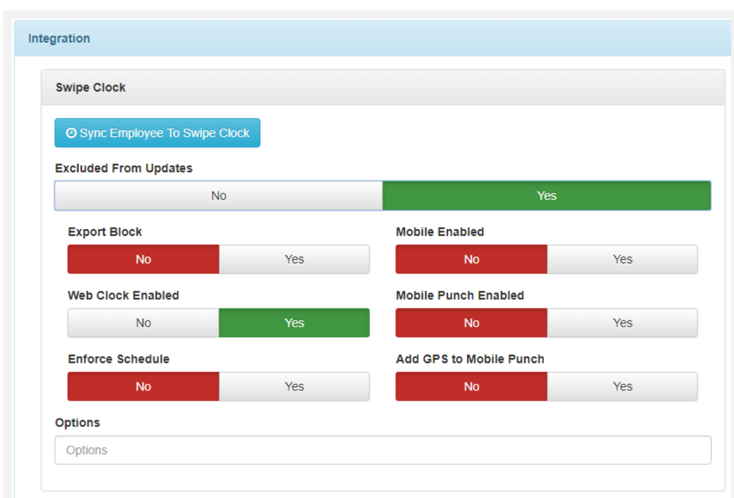
1. Go to **Employee Maintenance – Employee Summary** screen for that employee and scroll down to the **Integration** section of the screen.

2. Synch the employee record between Advanced HR and SwipeClock by clicking the **Synch Employee To Swipe Clock** 

button.

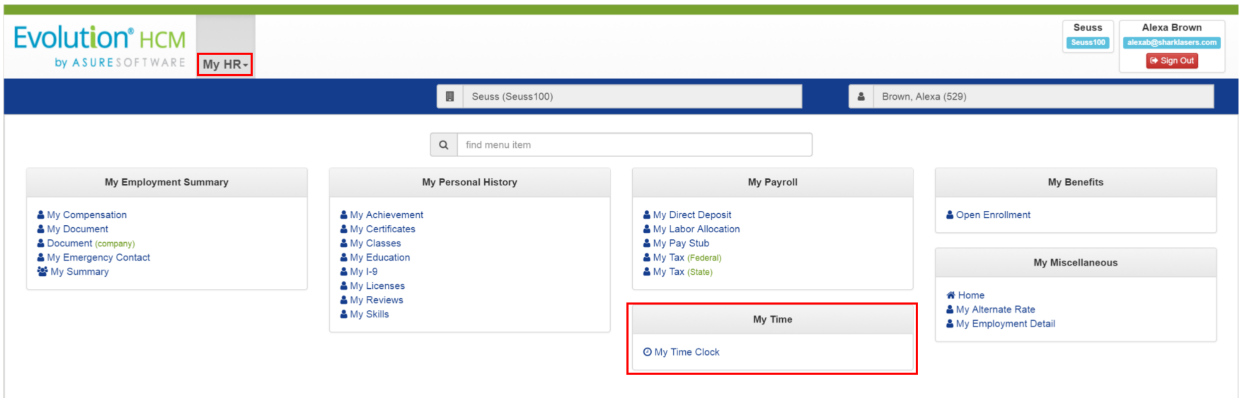


Note: If this is a salary or non Timeclock user, meaning the employee will not be using Timeclock, then the Admin needs to set the **Excluded From Updates** option on this employee from **No** to **Yes**. Otherwise each update to the employee will try to send information to TimeClock which will create errors.

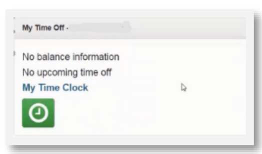


The End User Experience (TimeClock)

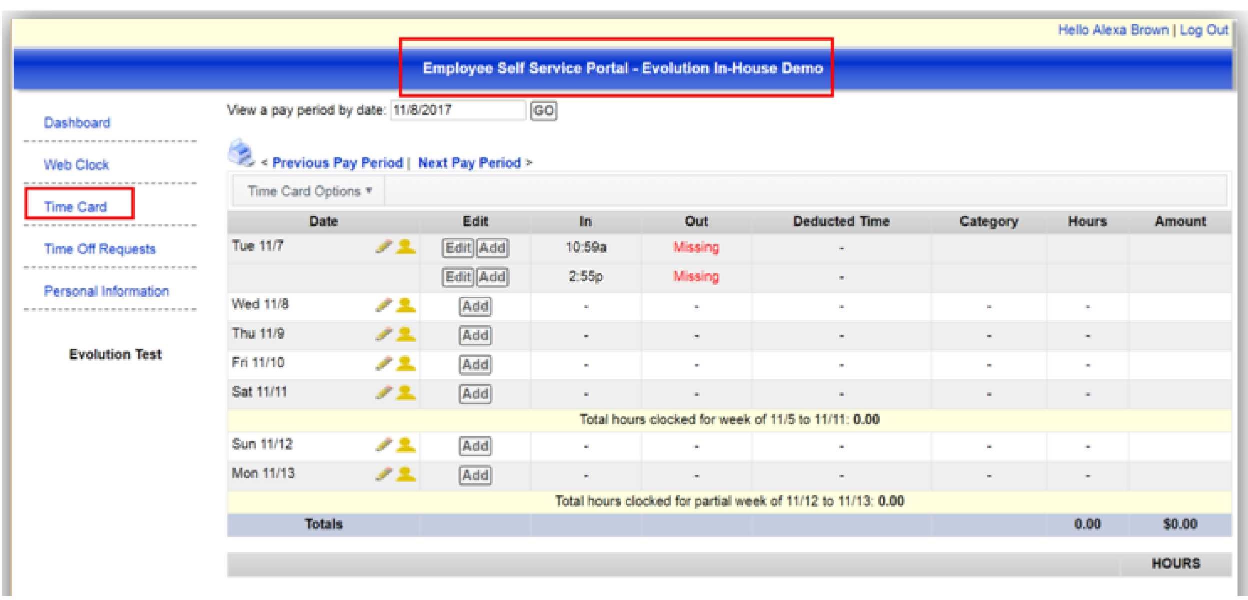
Once the user credentials have been set up, the employee will have a seamless experience while using SwipeClock. On the employee's **My HR** tab in Advanced HR, there will be a **My Time** pane with a **My Time Clock** menu option.

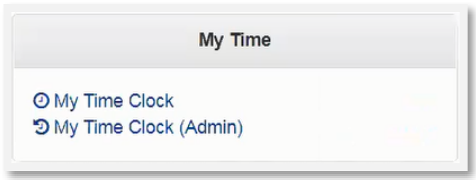


From the Dashboard, an option to open **My Time Clock** is available.



If the user clicks the **My Time Clock** menu option, they are taken to the SwipeClock application.

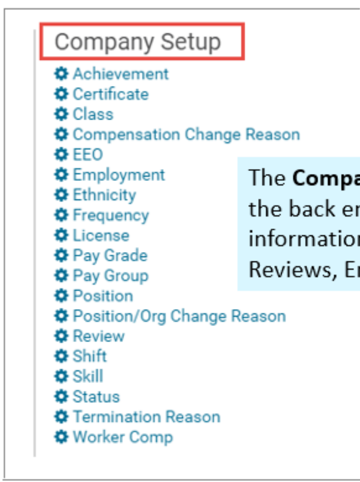




The user clicks on the **Time Card** option on the left of the screen to access their Timecard and punches.

If the user also has Admin access in SwipeClock, under **My Time,** two SwipeClock links will display.

Company Setup Menu



The **Company Setup** tile on the **HR Admin** tab allows the back end (Admin) user to view and edit company information, such as, Positions, Pay Grades, Employee Reviews, Employee Statuses, and more.

After the Payroll Data Cutover has been performed successfully, there are a few company level setup tasks to perform. Many fields, both company level and employee level, will be brought over from Evolution. However, some information will not come over. It is best practice to enter some information in the early stages of implementing Advanced HR 2.0.

Selected setup tasks to be done after the Payroll Data Cutover can involve:

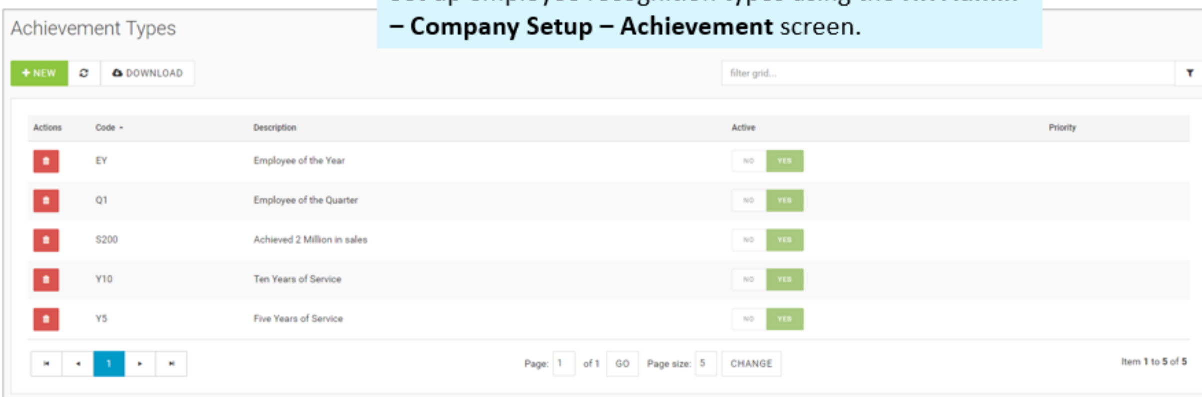
- Creating **Position Types**. See Position Type
- Adding **Position/Org Change Reasons**. See Position/Org Change Reason
- Creating an organizational structure in the Employment Detail: **Reports to** Fields.

The **Company Setup** screen is where you maintain *both* employee and company data fields. Depending on your security settings, you may be able to add, edit, inactivate, and delete specific codes.

Achievement Types

Achievements are a type of employee recognition that can be easily set up and linked to employees. An example of an achievement might be an Employee of the Quarter award or recognition of a sales goal that has been met.

Set up employee recognition types using the **HR Admin – Company Setup – Achievement** screen.



Achievements are assigned to employees on the **HR Admin – Employee Maintenance – Achievements** screen.

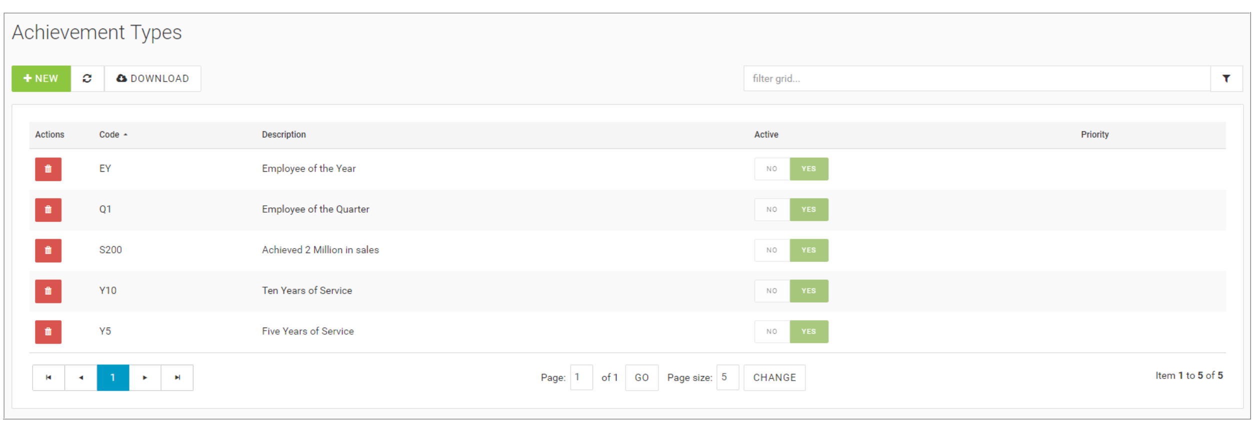
This section will discuss the following tasks related to Achievements:

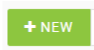
- Creating an Achievement Type
- Assigning an Achievement to an Employee
- Reporting on Achievements
- Employees View their Achievements

Creating a New Achievement Type

To create a new Achievement Type:

1. Go to **HR Admin – Company Setup – Achievement**.
2. The system displays the **Achievement Types** screen which will display any existing achievements which have already been set up.



3. Click the **+ New** button 

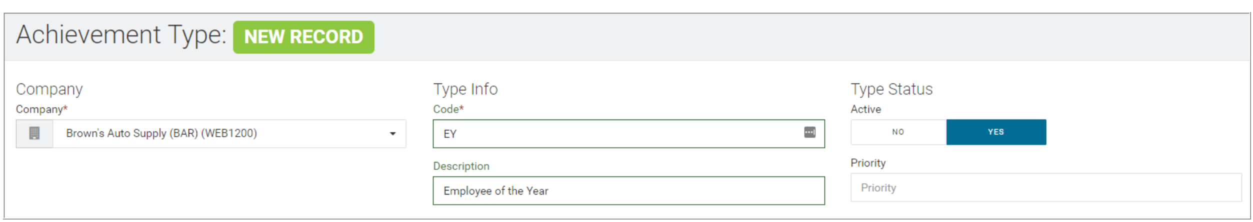
to create a new Achievement Type. The system displays the **New Record** screen.

Complete the information on the screen as described in the table below:

Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Create a code for the Achievement Type. This is a required field.
Description	Enter a description for the Achievement Type.
Type Status section	
Active	Set the **Active** Yes/No toggle switch to **Yes** to make this code active. To set the code to be inactive, set this to **No**.
Priority	This optional field is used to control the order of the values that display in the Achievement Type dashboard. If left blank here, the values will be listed in alpha-numeric order.

4. Click the **Save Changes** 

button or **Save and Next Record** if you want to create more achievements.



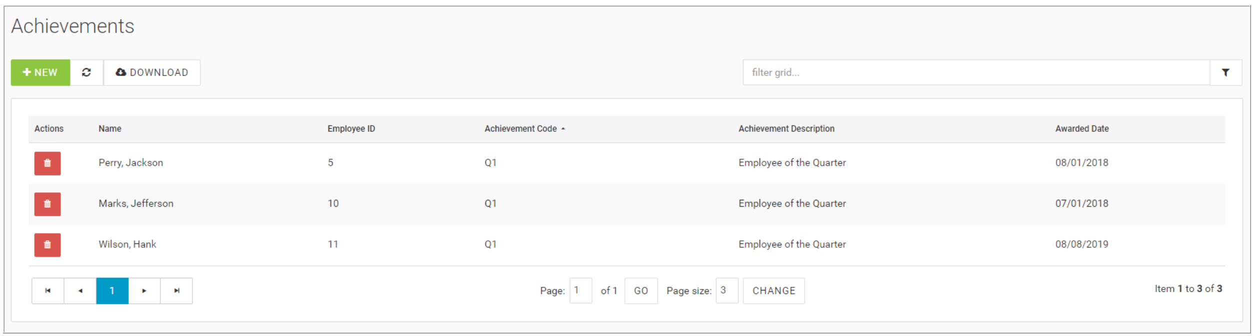
The Achievement Type you just created will now display on the **Achievement Type** summary screen (Employee of the Year).

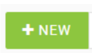
Assigning an Achievement to an Employee

Once Achievement Types have been created, you can assign an achievement to an employee.

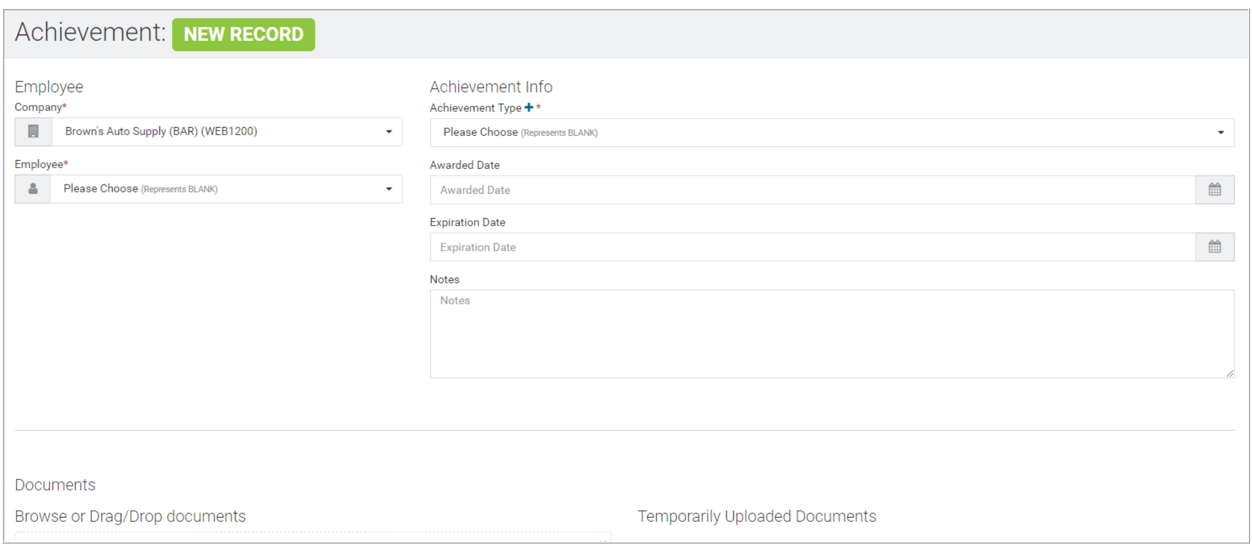
To assign an Achievement to an employee:

1. Go to **HR Admin – Employee Maintenance – Achievements**.
2. The system displays the **Achievements** dashboard screen. If you are locked down on a **company**, the system displays the Achievements for all employees of the company. If you are not locked down on a company, the system displays Achievements for all employees of all client companies. If you are locked down on an **employee**, the screen will show a list of that employee's achievements, if applicable.



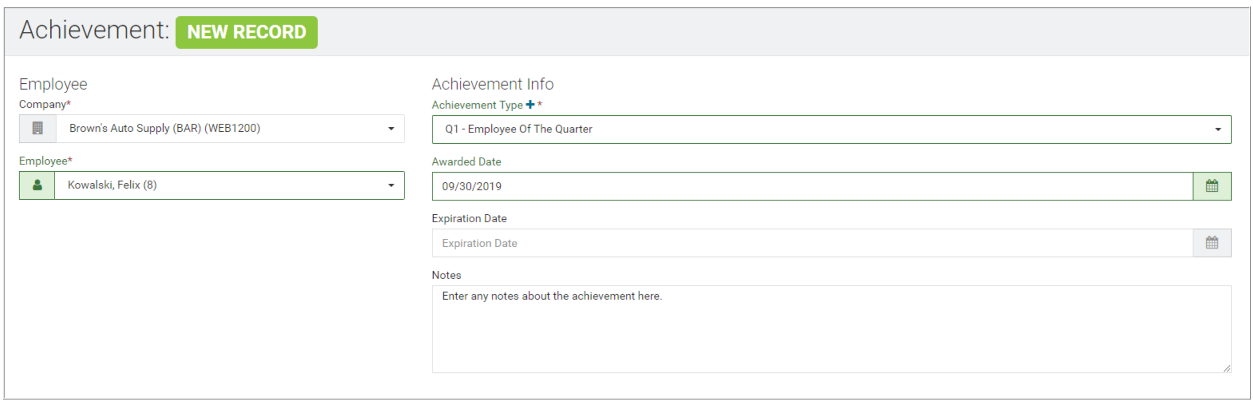
3. Click the **+ New** button 

. The system displays the **New Record** screen.

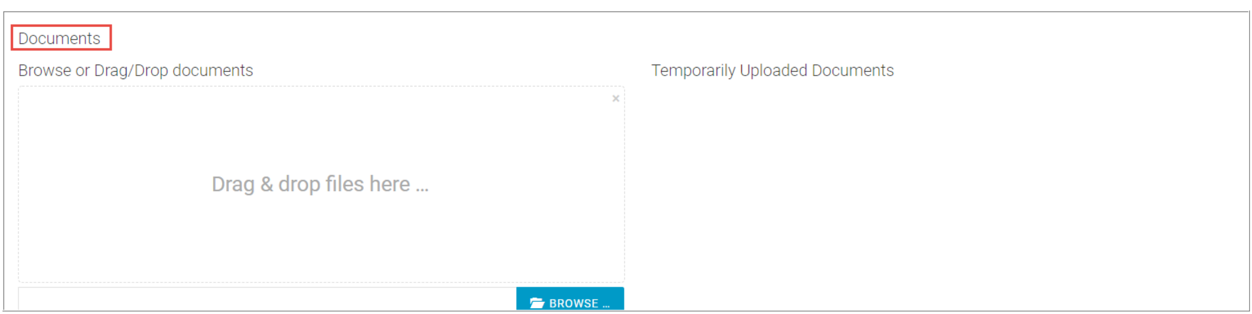


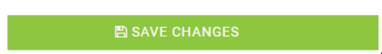
Field / Button	Description
Employee section	
Company	Select the company if not already selected.
Employee	Select the employee if not already selected. This is a required field.
Achievement Info section	

Field / Button	Description
Achievement Type	Select the type of achievement you want to assign to the employee from the dropdown. This is a required field. You can also create an Achievement Type here “on the fly” if it does not already exist in the system by clicking the blue **+** sign icon.
Awarded Date	Enter or select the date from the calendar that the achievement was awarded.
Expiration Date	Enter an expiration date for the Achievement, if applicable.
Notes	Enter any notes related to the Achievement.



You can also upload any documents related to the Achievement in the **Documents** section (scroll down the screen).



4. When complete, click the **Save Changes** button .

The Achievement you just assigned to the employee will now display on the **Achievements** dashboard, which lists all achievements assigned to all employees.

Achievement Related Reports

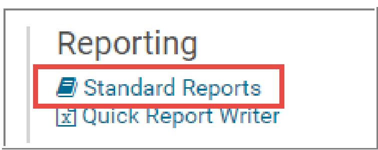
You can run two Achievements-related standard reports that will list all the Achievements Types that have been created for a company:

- Achievement Types List report
- Expiring Achievements report
- In addition, you can create a custom report for Achievements

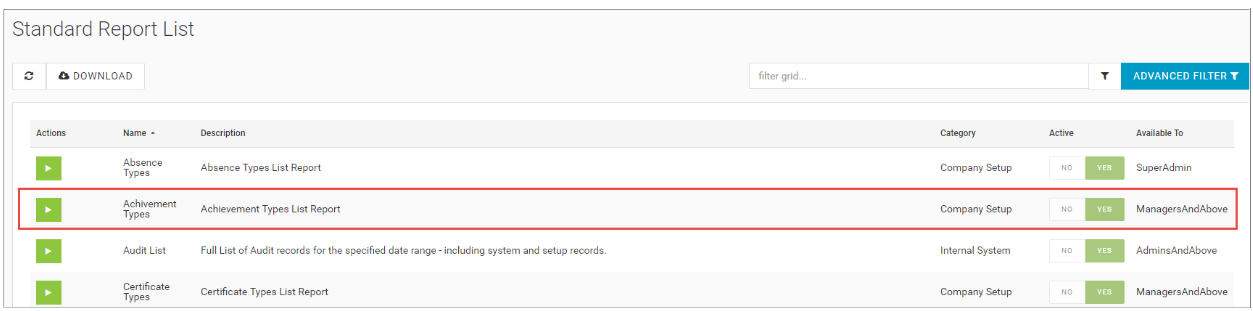
Each topic is discussed below.

To run the Achievement Types List Report:

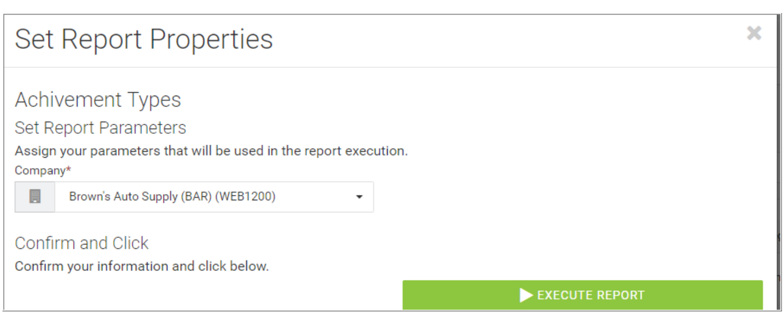
1. Go to **HR Admin – Reporting – Standard Reports**.



2. The system displays the **Standard Report List** screen.

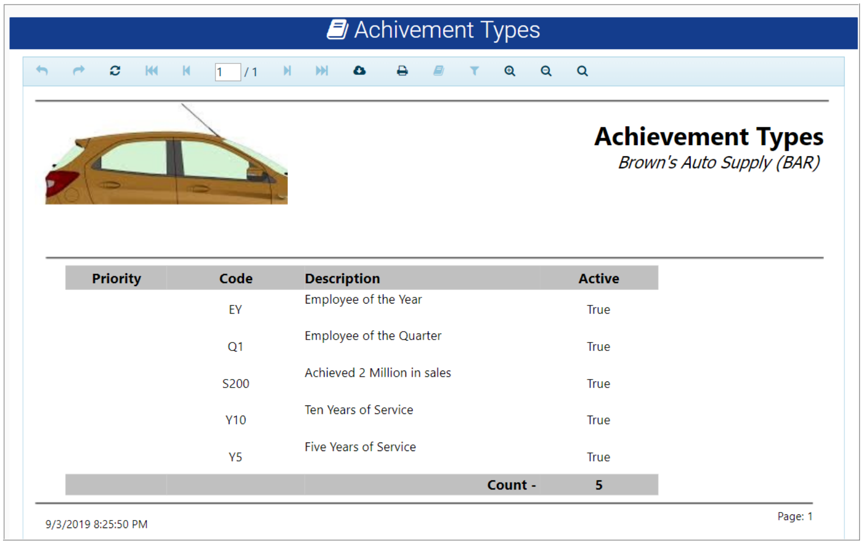


3. Click on the green arrow  button on the **Achievement Types Report List** row.
4. The system displays the **Set Report Properties** screen.



5. Select the **Company**, if not already selected.
6. Click the **Execute Report** button 

.
7. The system displays the **Achievements Types** report in a new window.



Achivement Types

Achievement Types

Brown's Auto Supply (BAR)

Priority	Code	Description	Active
	EY	Employee of the Year	True
	Q1	Employee of the Quarter	True
	S200	Achieved 2 Million in sales	True
	Y10	Ten Years of Service	True
	Y5	Five Years of Service	True
		Count -	5

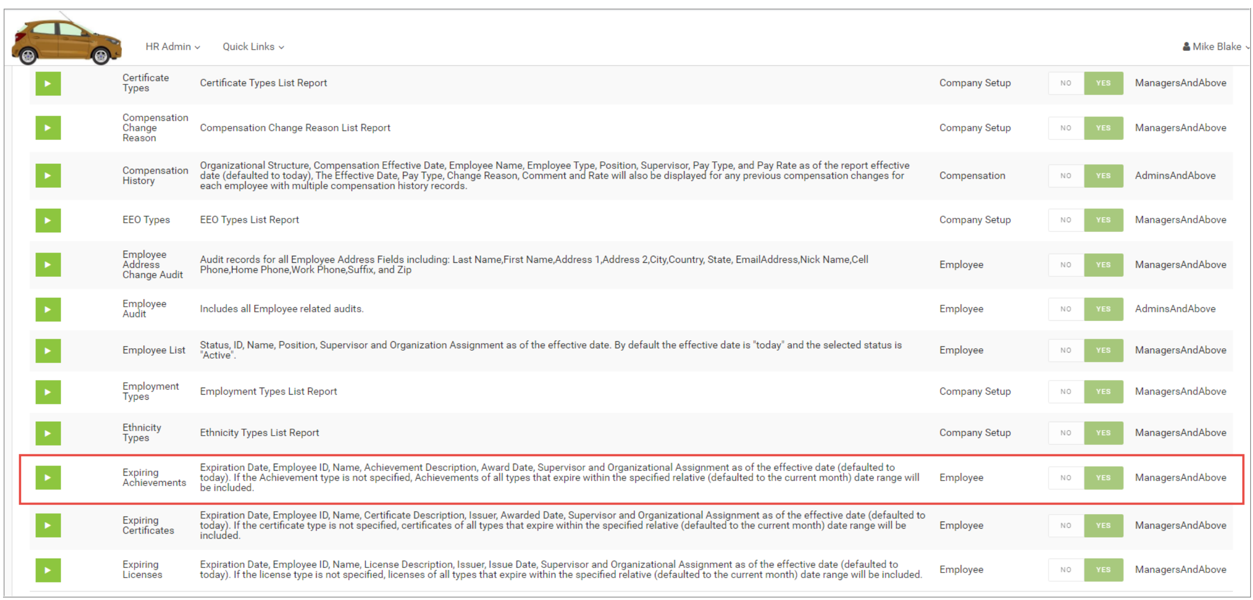
9/3/2019 8:25:50 PM

Page: 1

To run the Expiring Achievements Standard Report:

You can run a report that will list all achievements that are expiring within a specified date range:

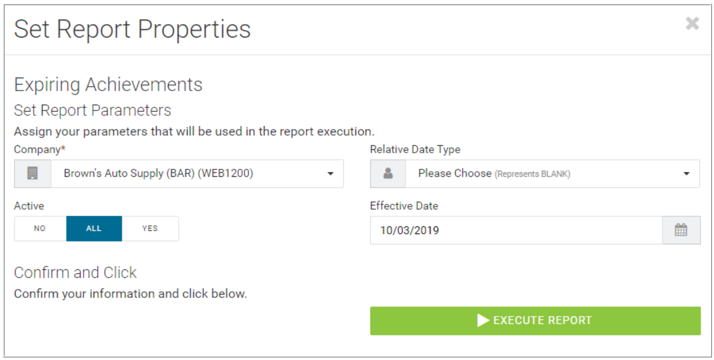
1. Go to **HR Admin – Reporting – Standard Reports**.
2. The system displays the **Standard Report List** screen.



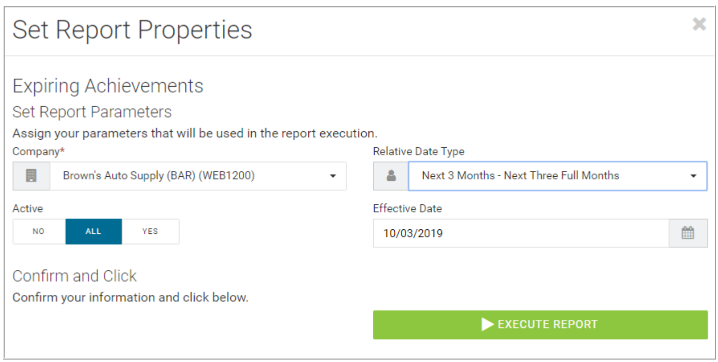
HR Admin ⌄ Quick Links ⌄ Mike Blake ⌄

Certificate Types	Certificate Types List Report	Company Setup	NO YES	ManagersAndAbove
Compensation Change Reason	Compensation Change Reason List Report	Company Setup	NO YES	ManagersAndAbove
Compensation History	Organizational Structure, Compensation Effective Date, Employee Name, Employee Type, Position, Supervisor, Pay Type, and Pay Rate as of the report effective date (defaulted to today), The Effective Date, Pay Type, Change Reason, Comment and Rate will also be displayed for any previous compensation changes for each employee with multiple compensation history records.	Compensation	NO YES	AdminsAndAbove
EEO Types	EEO Types List Report	Company Setup	NO YES	ManagersAndAbove
Employee Address Change Audit	Audit records for all Employee Address Fields including: Last Name,First Name,Address 1,Address 2,City,Country, State, EmailAddress,Nick Name,Cell Phone,Home Phone,Work Phone,Suffix, and Zip	Employee	NO YES	ManagersAndAbove
Employee Audit	Includes all Employee related audits.	Employee	NO YES	AdminsAndAbove
Employee List	Status, ID, Name, Position, Supervisor and Organization Assignment as of the effective date. By default the effective date is "today" and the selected status is "Active".	Employee	NO YES	ManagersAndAbove
Employment Types	Employment Types List Report	Company Setup	NO YES	ManagersAndAbove
Ethnicity Types	Ethnicity Types List Report	Company Setup	NO YES	ManagersAndAbove
Expiring Achievements	Expiration Date, Employee ID, Name, Achievement Description, Award Date, Supervisor and Organizational Assignment as of the effective date (defaulted to today). If the Achievement type is not specified, Achievements of all types that expire within the specified relative (defaulted to the current month) date range will be included.	Employee	NO YES	ManagersAndAbove
Expiring Certificates	Expiration Date, Employee ID, Name, Certificate Description, Issuer, Awarded Date, Supervisor and Organizational Assignment as of the effective date (defaulted to today). If the certificate type is not specified, certificates of all types that expire within the specified relative (defaulted to the current month) date range will be included.	Employee	NO YES	ManagersAndAbove
Expiring Licenses	Expiration Date, Employee ID, Name, License Description, Issuer, Issue Date, Supervisor and Organizational Assignment as of the effective date (defaulted to today). If the license type is not specified, licenses of all types that expire within the specified relative (defaulted to the current month) date range will be included.	Employee	NO YES	ManagersAndAbove

3. Scroll down and click on the green arrow button  on the **Expiring Achievements** report row.
4. The system displays the **Set Report Properties** screen. This report will prompt you to filter the report parameters.



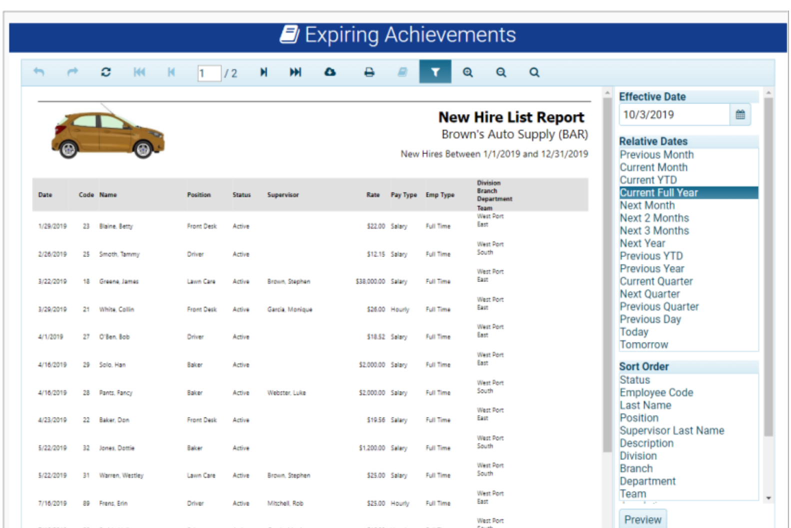
5. Select the **Achievement Type** and then filter by the Expiring Date wanted in the **Relative Date Type** dropdown.



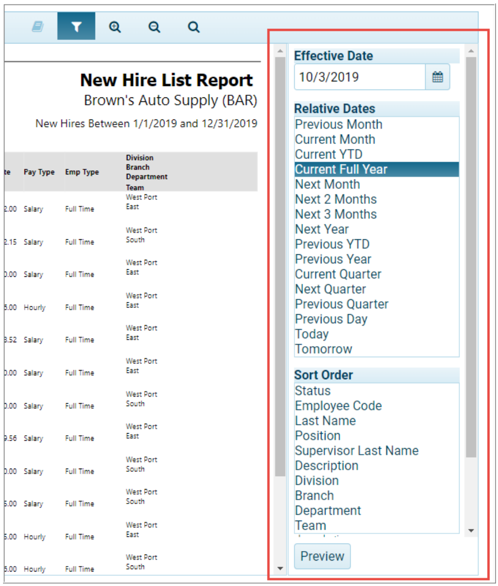
6. You can also select an **Effective Date**. When complete, click the **Execute Report** button

.

7. The system displays the **Expiring Achievements** report in a new window.



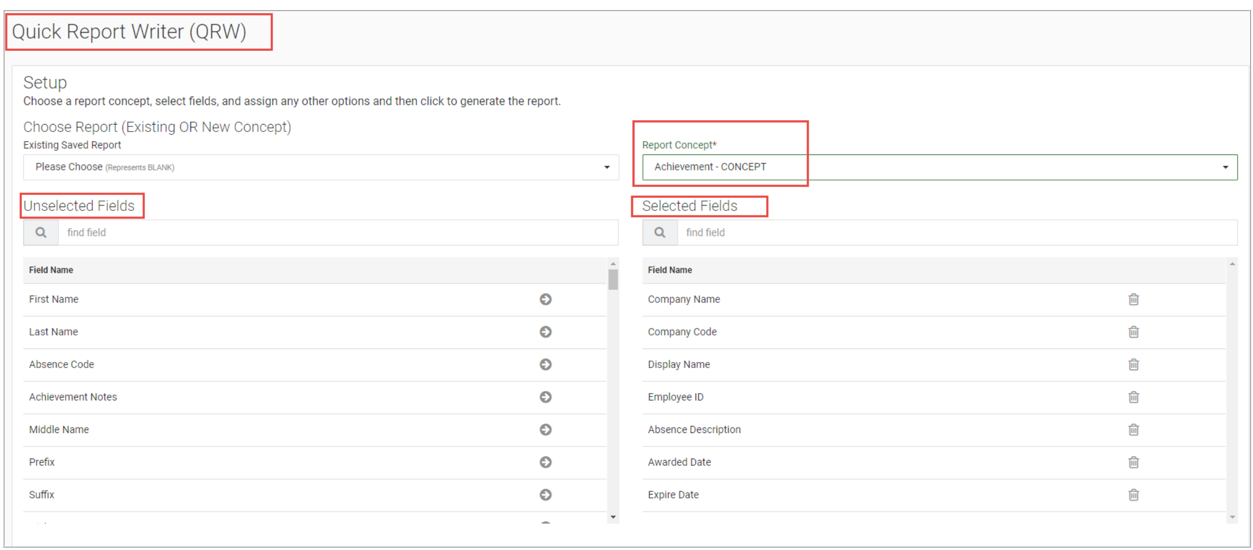
You can also edit the parameters of the report from within the report itself on the right side of the screen.



Creating a Custom Report for Achievements

You can create a custom report for Achievements by using the **Quick Report Writer** tool (QRW).

1. Go to **HR Admin – Reporting – Quick Report Writer**.
2. The system displays the **Quick Report Writer** screen.



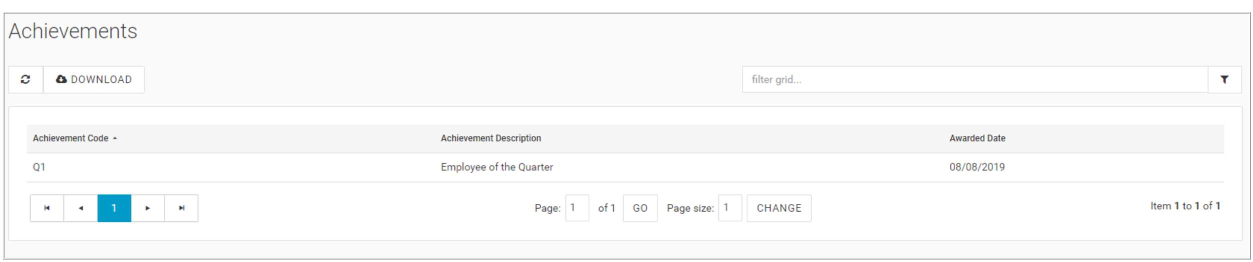
3. In the **Report Concept** dropdown, select the **Achievement – Concept**.

4. The system displays a list of Achievement-related fields to include on your custom report on achievements assigned to employees in the **Selected Fields** section.

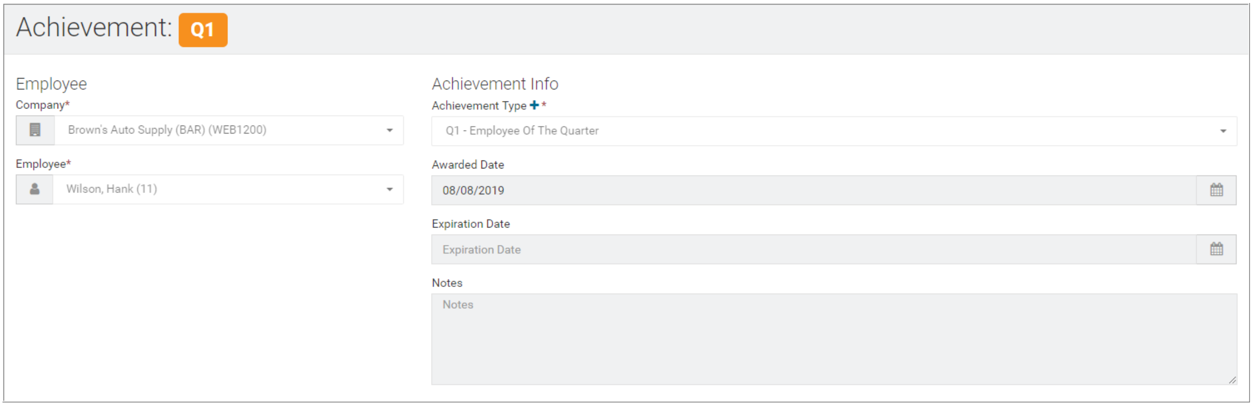
You can also add fields from the **Unselected Fields** section on the left of the screen by clicking on the right arrow icon next to the field you want to add. That field will then move to the right (Selected Fields) section of the screen.

Employees View their Achievements

Employees can view a list of their achievements by going to their **My HR – My Personal History – My Achievement** screen. The system displays their Achievements dashboard.

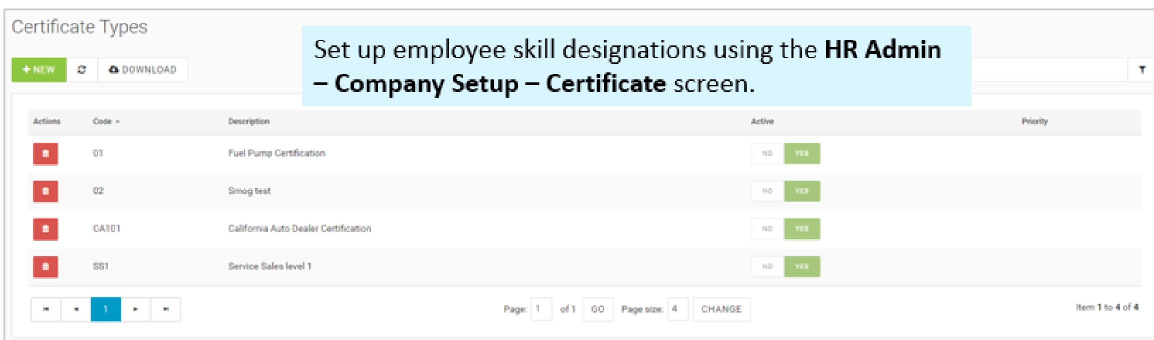


They can click on an Achievement row to display the details of the achievement.



Certificate Type

The term **certification** is often used as a catch-all term for several different activities that apply to credentialing of individuals and institutions. Certificates are designations related to skills, knowledge, or earned credentials an employee might hold. Employee certifications and licenses are required for compliance in certain industries; they can also serve as important designations that impact salary decisions.



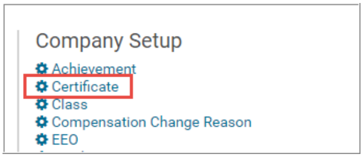
Certificates are assigned to an employee using the **HR Admin – Employee Maintenance – Certificates** screen.

This section will discuss the following topics:

- Setting up a Certificate Type
- Reporting on Certificates
- Assigning a Certificate to an Employee
- Employees View their Certificates

Creating a New Certificate Type

1. To add a new Certificate Type, go to **HR Admin – Company Setup – Certificate**.



2. Click on the **+ New** button 

, and the system displays the **New Record** screen.

Complete the information on the screen as described in the following table:

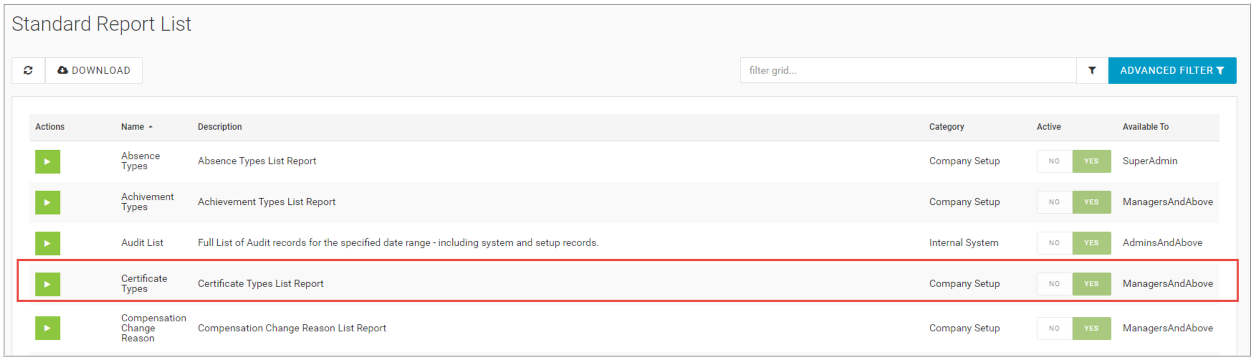
Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Create a code for the Certificate Type. This is a required field.
Description	Enter a description for the Certificate Type.
Type Status section	
Active	Set the **Active** Yes/No toggle switch to **Yes** to make this code active. To set the code to be inactive, set this to **No**.
Priority	This optional field is used to control the order of the values that display in the **Certificate Types** dashboard. If left blank here, the values will be listed in alpha-numeric order.

3. Click **Save Changes**. The Certificate Type you just added then displays on the **Certificate Types** dashboard.

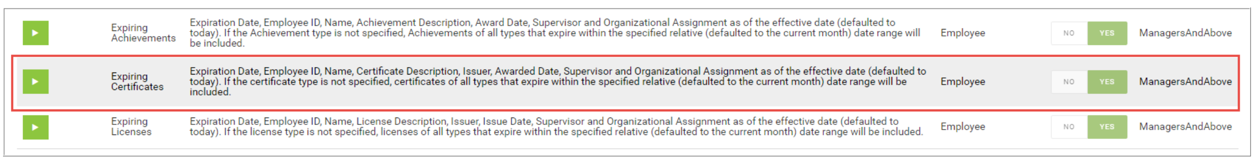
Certificate Related Reports

Note that you can run a Standard Report to display a list of the created certificate types.

1. Go to **HR Admin – Reporting – Standard Reports**.
2. Run the **Certificate Types List Report**.

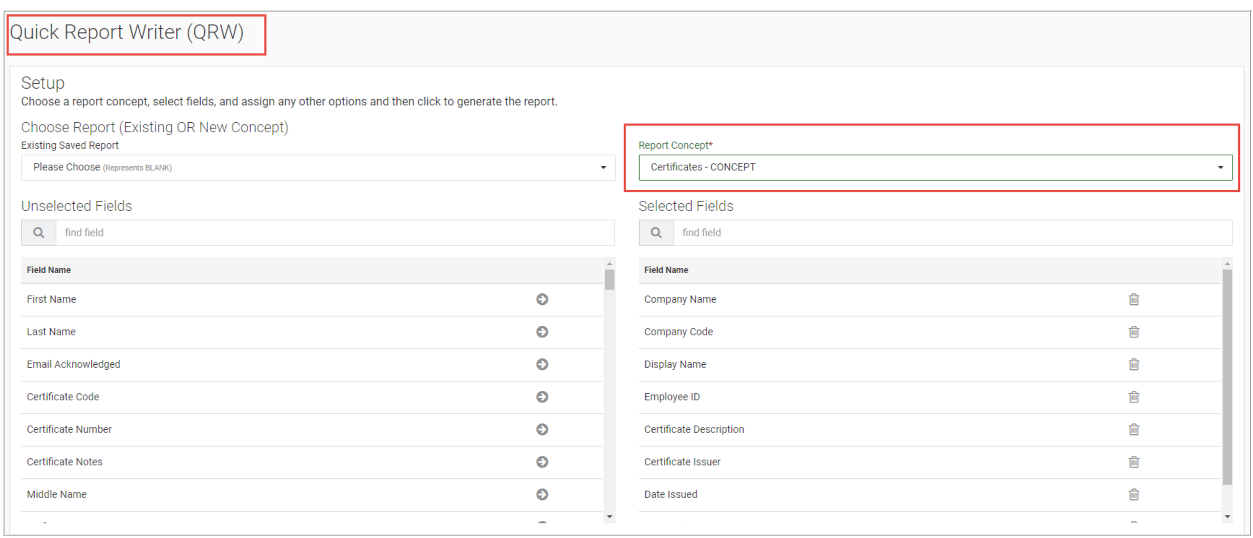


There is also a report that will provide a list of expiring certificates. Go to **HR Admin – Reporting – Standard Reports** and run the **Expiring Certificates Report**.



You can also create a custom report for certificates.

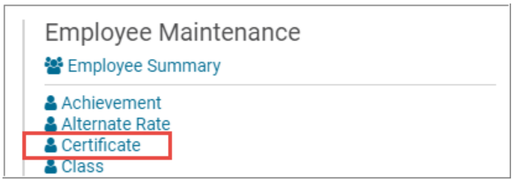
1. Go to **HR Admin – Reporting – Quick Report Writer**.
2. In the **Report Concepts** dropdown, select the **Certificates - Concept**.



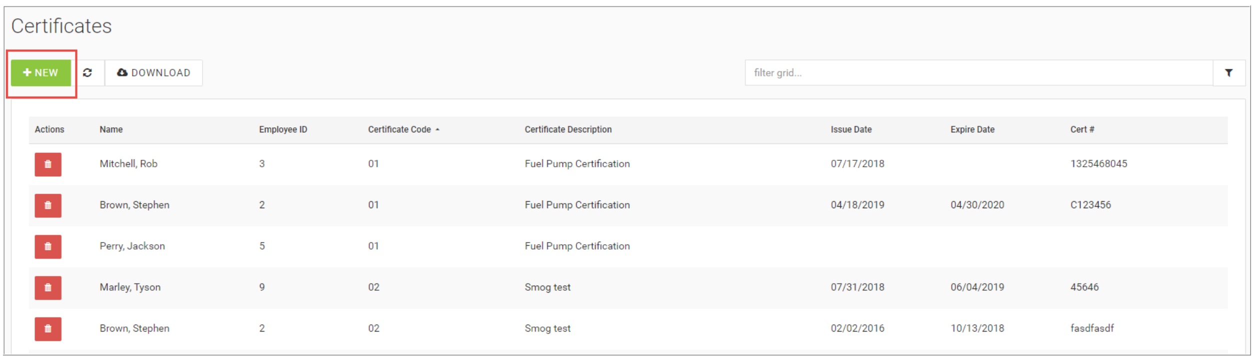
Assigning a Certificate to an Employee

Once Certificate Types have been setup for a company, admins can assign a certificate to an employee:

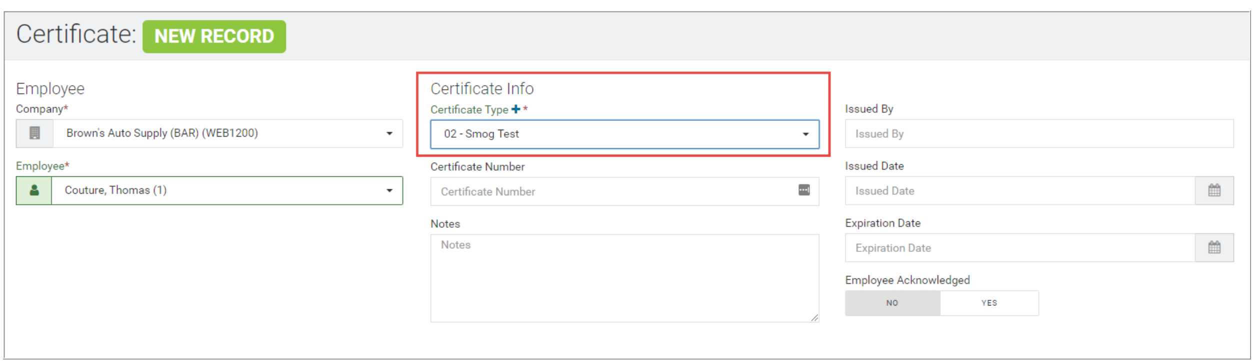
1. Go to **HR Admin – Employee Maintenance – Certificate**.



2. The system displays the **Certificates** screen.



3. Click the **+ New** button  . Select an **Employee** (if not already locked in) and assign a certificate to the employee.
4. In the **Certificate Type** dropdown, select the certificate to award to this employee.

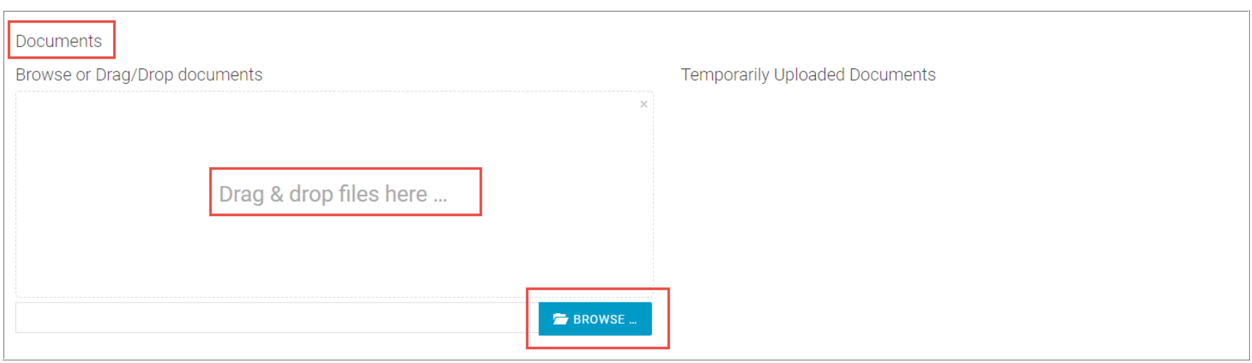


Complete the information on the screen as described in the following table:

Field / Button	Description
Employee section	
Company	Select the company if not already selected.
Employee	Select the employee if not already selected. This is a required field.

Field / Button	Description
Certificate Info section	
Certificate Type	Select the type of certificate you want to assign to the employee from the dropdown. This is a required field. You can also create a Certificate Type here "on the fly" if it does not already exist in the system by clicking the blue **+** sign icon.
Certificate Number	Enter the number of the certificate, if applicable.
Notes	Enter any notes related to the certificate.
Issued By	Enter the name of the organization etc., that issued the certificate.
Issued Date	Enter or select the date from the calendar that the certificate was issued.
Expiration Date	Enter an expiration date if you want to set up a Date-based Notification for a Certificate expiration that will appear on the employee's company Dashboard by using the **HR Admin – Communications – Notifications** screen. When the certificate is about to expire, a notification will be triggered to be sent to the employee.
Employee Acknowledged	If the employee is to acknowledge the certificate, make sure the toggle switch is set to **Yes**.

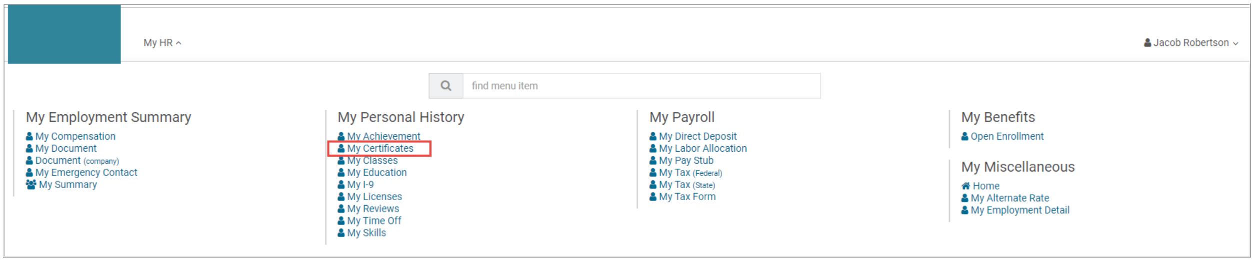
You can also upload any documents related to the certificate for the employee using the Browse or Drag & Drop feature in the **Documents** section of the screen.



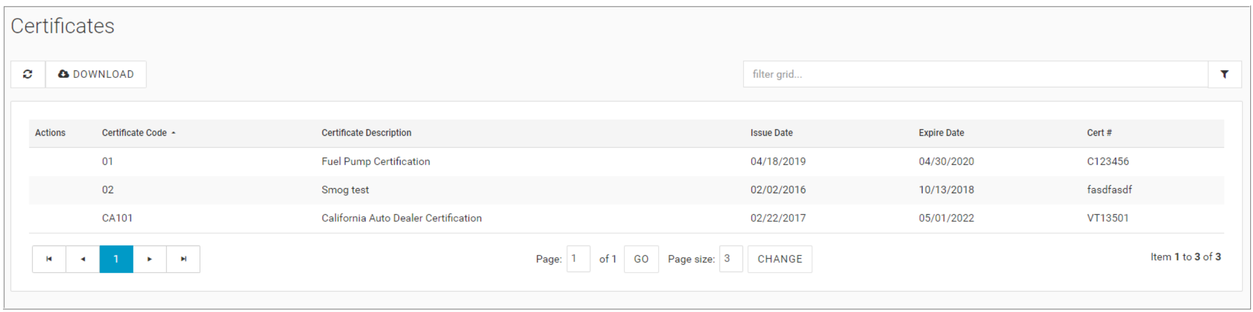
5. Click the **Save Changes** button to save this certificate for this employee.

Employees Display a List of their Certificates

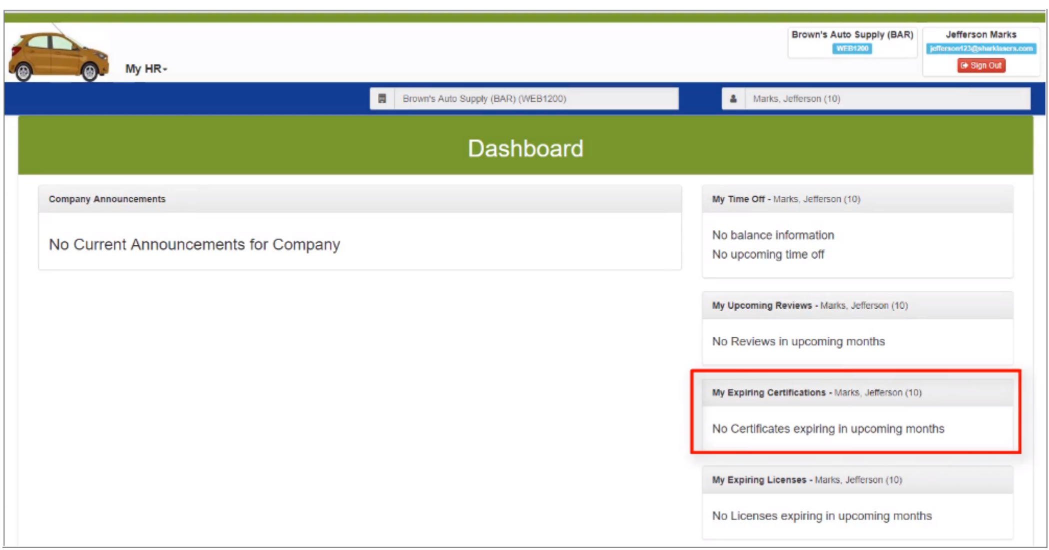
Employees can display a list of their certificates on their **My HR - My Personal History - My Certificates** screen.



This menu option is similar to **My Achievements** and provides a list of any certifications with the details displayed by clicking on a specific certification item row on the summary screen.

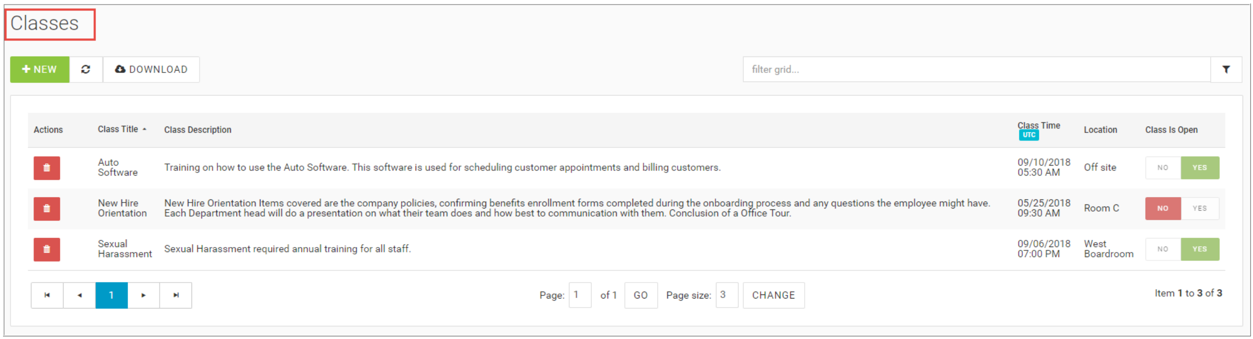


If an employee's certificate is about to expire, they will be notified, if this feature has been enabled, on their company Dashboard in the **My Expiring Certifications** section on the right side.



Classes

In Advanced HR, Classes are used to assign to employees for continued learning and training. The Advanced HR training class management system allows you to set up classes and track employees' participation in training. The **Classes** dashboard lists any existing classes. This is also where you can create and maintain classes.



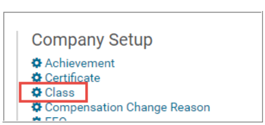
This section will discuss the following tasks:

- Creating a Class Type
- Enrolling Employees in a Class:
  - Enrolling an Individual Employee in a Class
  - Enrolling Multiple Employees in a Class
- Class Related Reporting
- Employees View their Assigned Classes

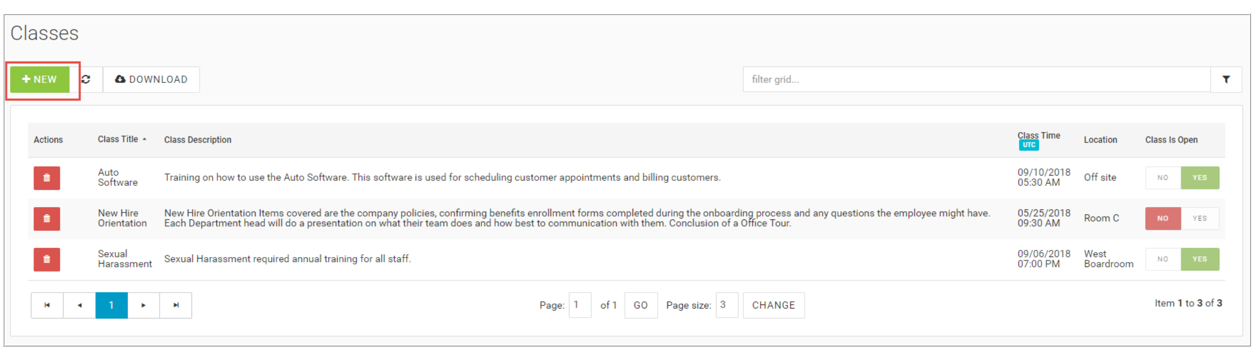
Creating a Class Type

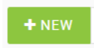
To create a new class type in Advanced HR:

1. Go to **HR Admin – Company Setup – Class**.

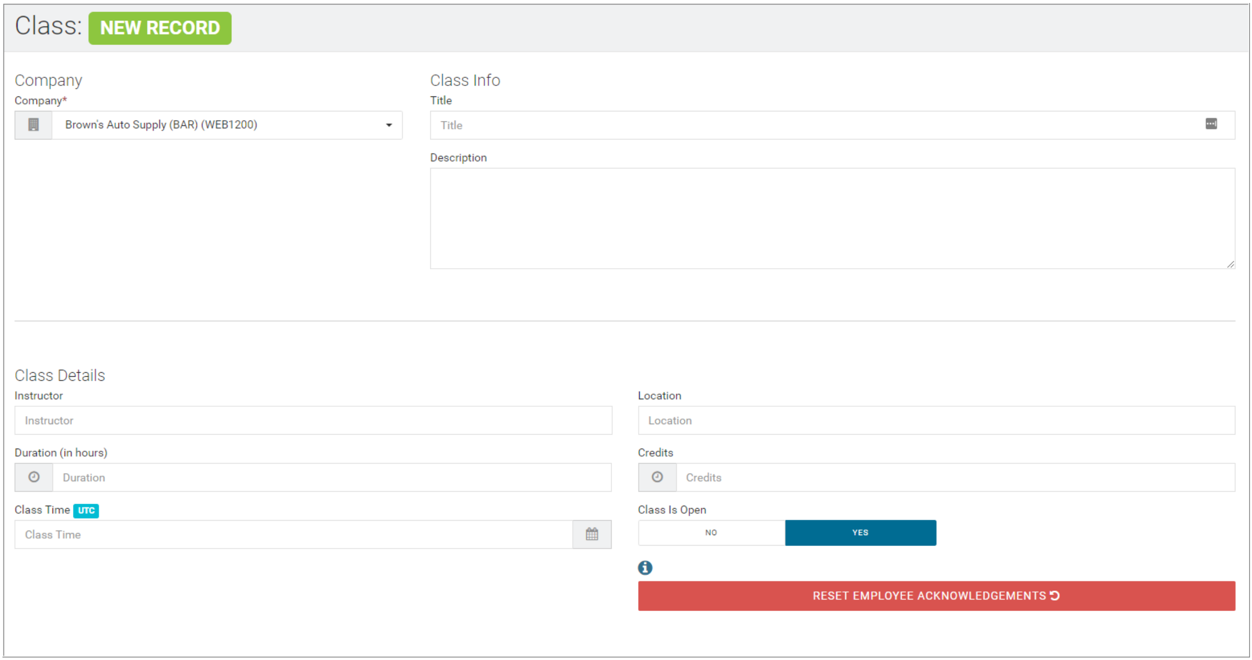


2. The system displays the **Classes** dashboard.

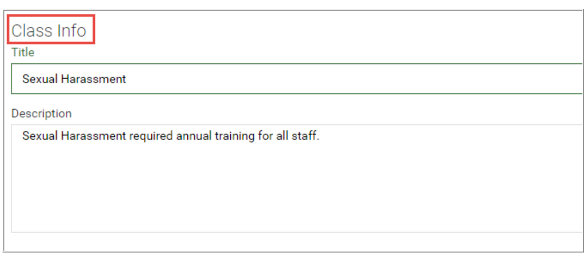


3. Click the **+ New button** 

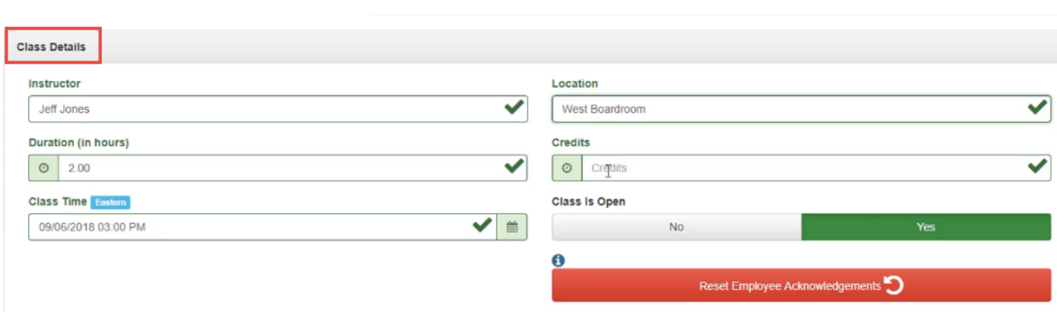
. The system displays the **Class New Record** screen.



4. In the **Class Info** section, enter the **Class Title** and a **Description** of the class.



5. In the **Class Details** section, enter the name of the **Instructor** for the class, the class **Location**, the **Duration** of the class in hours and the **Class Time**. **Credits** for the class can be assigned if needed.



This information is used when you enroll the employees in the class.

Note: If the class will run in multiple sessions, create a Class Type for each session.

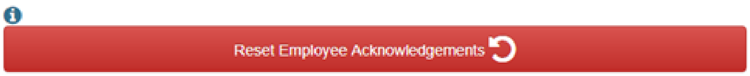
If you set the **Class is Open** toggle switch to **Yes**, then the class is available to assign to employees. If you set it to **No**, then the class will not be available to assign to employees.

6. Click **Save Changes** 

when complete.

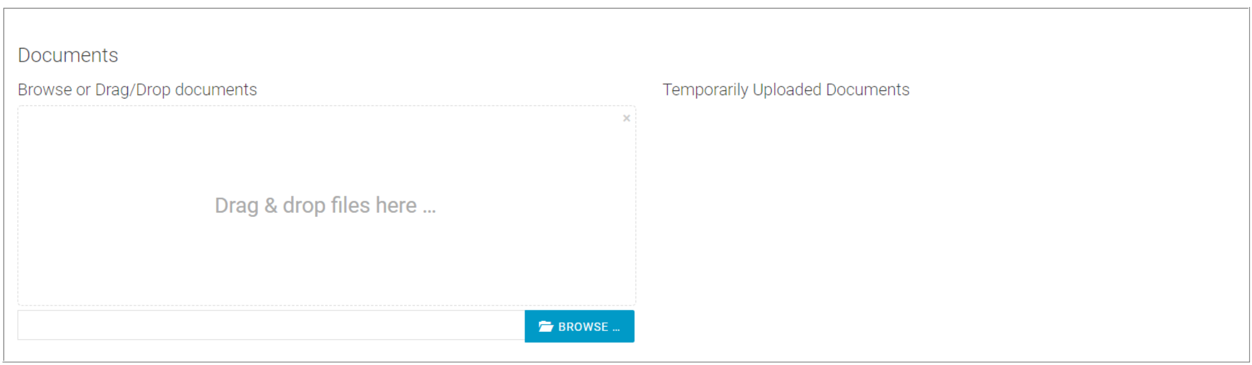
Reset Employee Acknowledgements button

The **Reset Employee Acknowledgements** button will resend the Notification to the employee of any changes related to their class.



Use this if you are changing pertinent class details, such as time or location, and want the acknowledgement icon to re-appear for this class on the Employee's **Dashboard**.

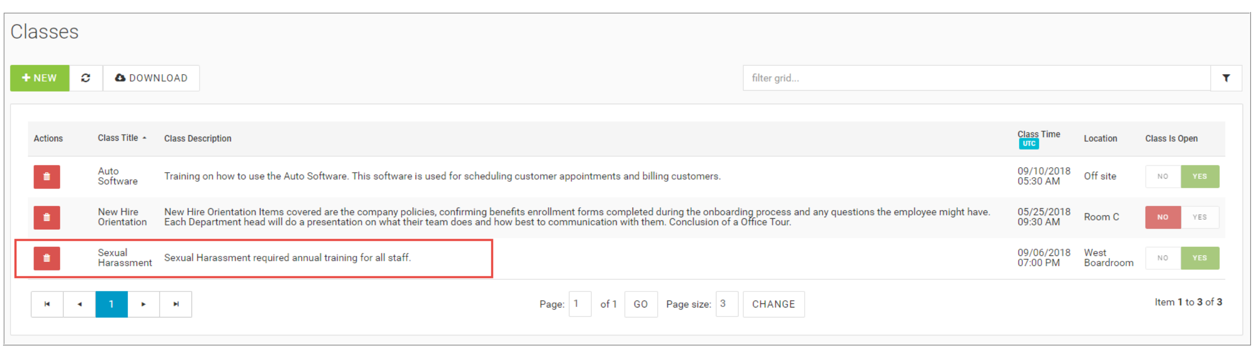
You can also attach documentation for each class that will be electronically available to the employees when they are enrolled in the class.



7. Click **Save Changes** 

or **Save Changes and Continue** to create additional classes.

The Class Type you just created will now display on the **Classes** dashboard.

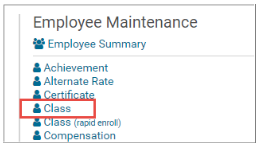


Enrolling Employees in a Class

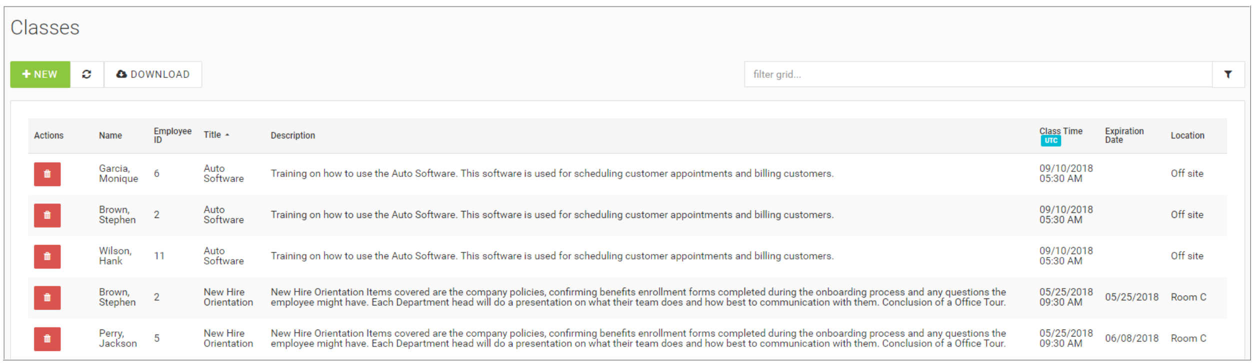
Once you have a Class Type created you can either enroll one employee in a class, or multiple employees in the Class at the same time. We will discuss each method below.

Enrolling an Individual Employee in a Class

1. Go to **HR Admin – Employee Maintenance - Class**.

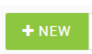


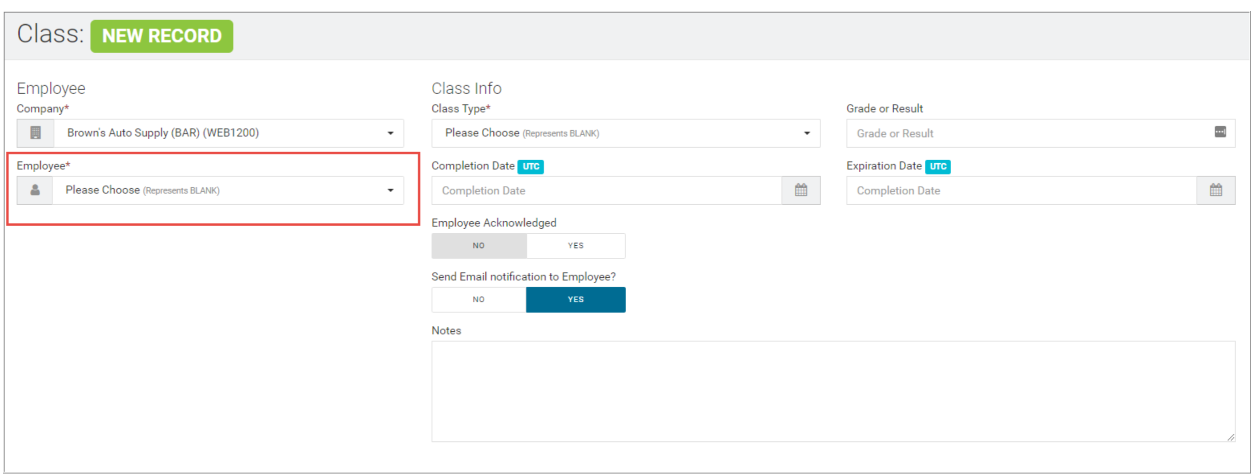
2. The system displays the **Class** dashboard which shows employees which have been enrolled in any classes.



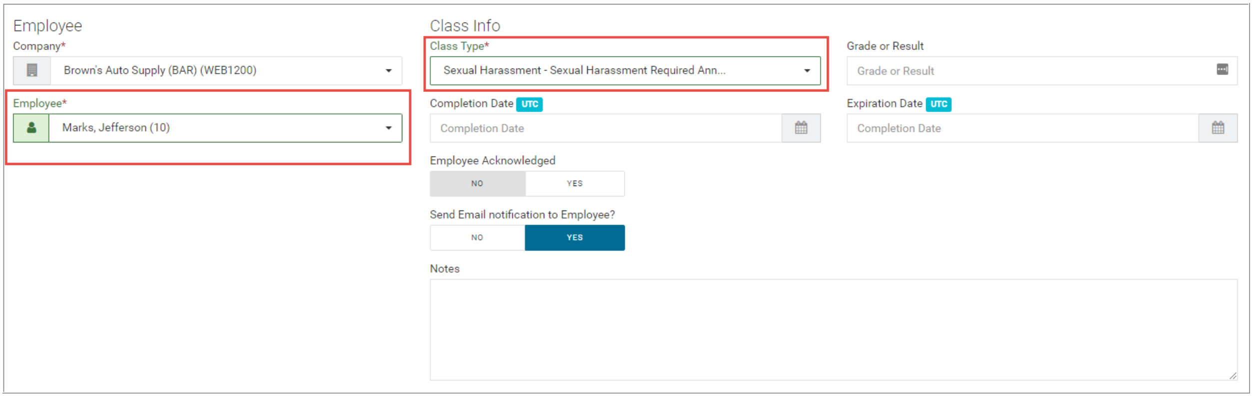
Actions	Name	Employee ID	Title	Description	Class Time UTC	Expiration Date	Location
	Garcia, Monique	6	Auto Software	Training on how to use the Auto Software. This software is used for scheduling customer appointments and billing customers.	09/10/2018 05:30 AM		Off site
	Brown, Stephen	2	Auto Software	Training on how to use the Auto Software. This software is used for scheduling customer appointments and billing customers.	09/10/2018 05:30 AM		Off site
	Wilson, Hank	11	Auto Software	Training on how to use the Auto Software. This software is used for scheduling customer appointments and billing customers.	09/10/2018 05:30 AM		Off site
	Brown, Stephen	2	New Hire Orientation	New Hire Orientation Items covered are the company policies, confirming benefits enrollment forms completed during the onboarding process and any questions the employee might have. Each Department head will do a presentation on what their team does and how best to communication with them. Conclusion of a Office Tour.	05/25/2018 09:30 AM	05/25/2018	Room C
	Perry, Jackson	5	New Hire Orientation	New Hire Orientation Items covered are the company policies, confirming benefits enrollment forms completed during the onboarding process and any questions the employee might have. Each Department head will do a presentation on what their team does and how best to communication with them. Conclusion of a Office Tour.	05/25/2018 09:30 AM	06/08/2018	Room C

You can select any row on the screen to make edits and changes for that employee's class enrollment.

3. Click the **+ New** button  to enroll an employee in a class. The system displays the **Class New Record** screen.

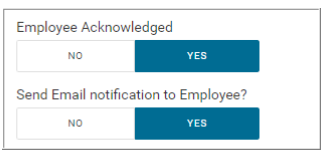


4. Select the **Employee** and in the **Class Info** section, select the **Class Type**.



Note that other information in the **Class Info** section: **Grade or Result**, **Completion Date**, **Expiration Date** and any other information can always be filled out later after the class has been completed.

5. The **Employee Acknowledgement** and the **Employee Notification**, as in other areas of the system, can be enabled for Classes, notifying the employee of their enrollment in a class.



We recommend that you do send an email Notification to the employee about the class. Refer to the *Notifications* section of this Guide for more information on how to set up the Notifications.

Class documents that were entered on the **Class Type** setup screen will be available to the employee here.

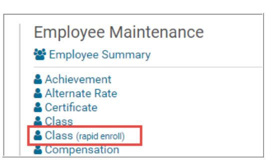
6. Click the **Save Changes** button 

.

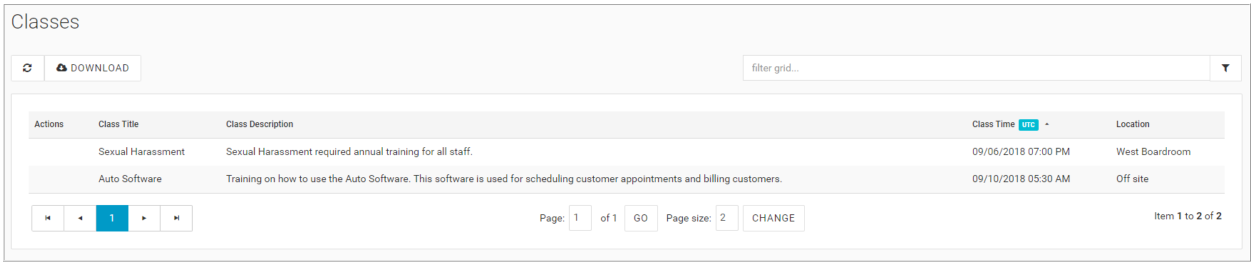
Enrolling Multiple Employees in a Class

You can enroll multiple employees in a class at the same time by following these steps:

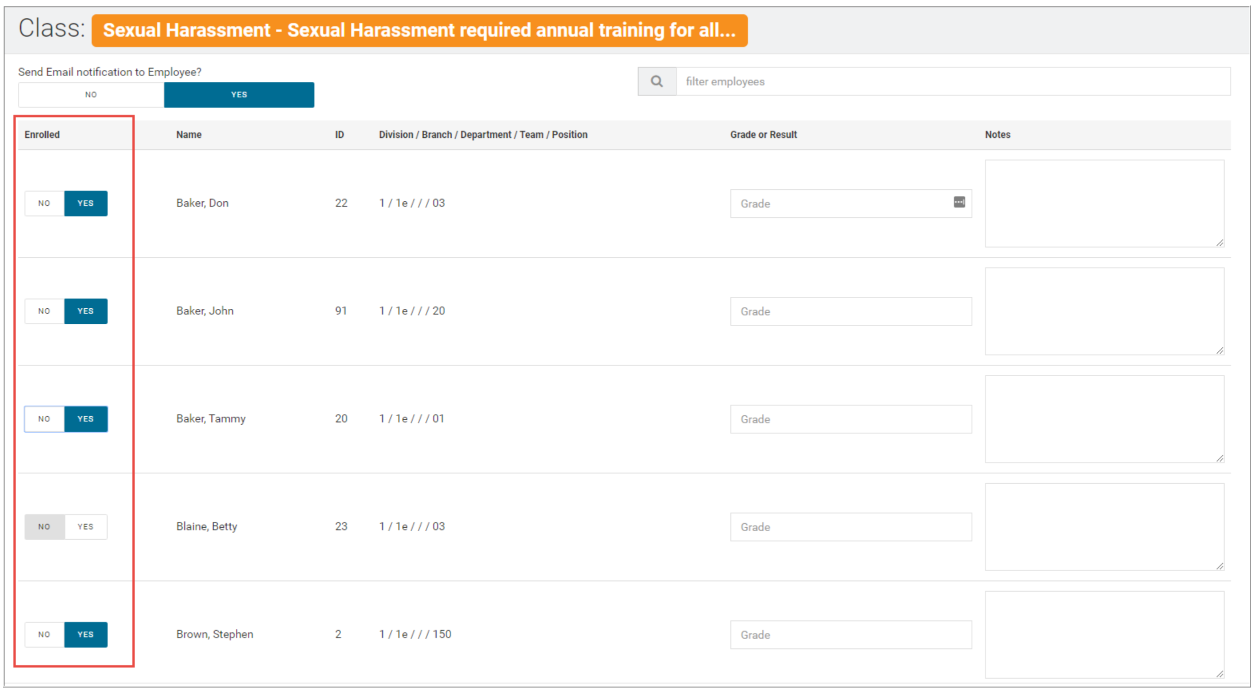
1. Go to **HR Admin – Employee Maintenance – Class (rapid enroll)**.



2. The system displays the **Classes** screen listing any existing classes which have already been setup and are open for enrollment.



3. Click on a row for the open class that you want to enroll employees for.
4. The system displays the **Classes** detail screen listing all active employees. It also displays whether any active employees are already enrolled in this current class.



5. To enroll any other additional employees into this class, under the **Enrolled** column, change the toggle switch from **No** to **Yes**.

In the example above, four employees have been enrolled in the Sexual Harassment class at once.

Note that the system defaults to **Sending Email Notifications to Employee** for each individual you enroll in a class.

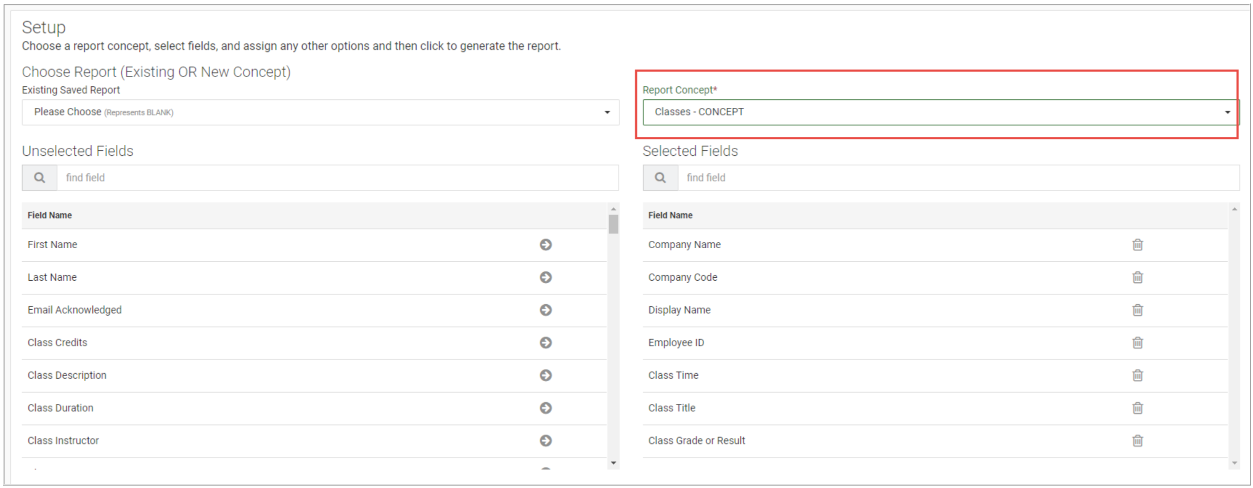
If you do not want to send an email notification to an employee, change the **Send Email Notification to Employee** toggle switch from **Yes** to **No**.

6. Click the **Save Changes** button.

Classes Related Reporting

You can create a custom report for Classes information using the **Quick Report Writer** tool (QRW).

1. Go to **HR Admin – Reporting – Quick Report Writer**.
2. The system displays the **Quick Report Writer (QWR)** screen.
3. In the **Report Concept** dropdown, select the **Classes - Concept**.

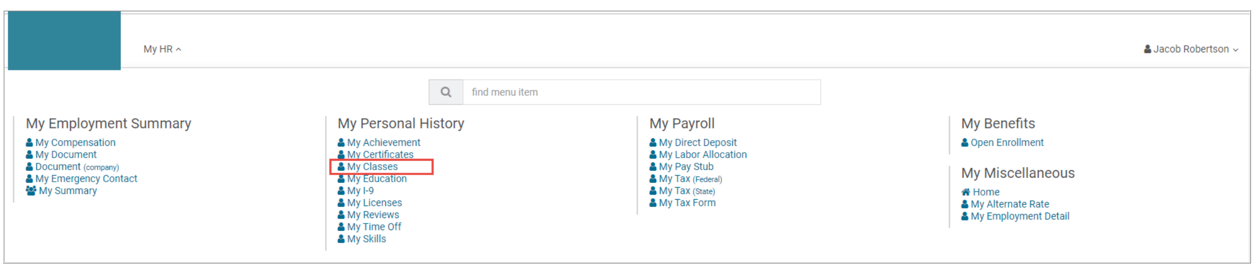


In the **Selected Fields** section, the system will display a list of Classes-related fields to create your custom report. You can select additional fields for your report by moving fields from the **Unselected Fields** section to the **Selected Fields** section on the right (click on the right arrow icon next to the field to move).

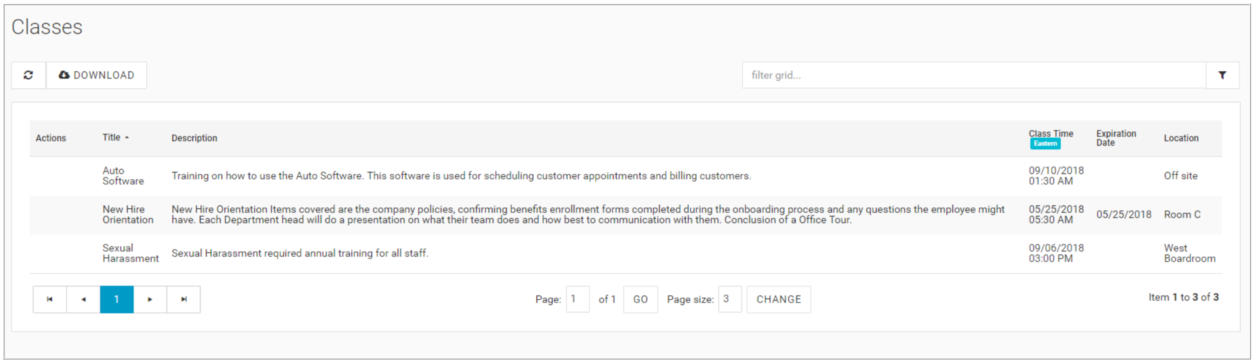
Employees View their Assigned Classes

The employees can see their assigned classes from their **My HR** screen by doing the following:

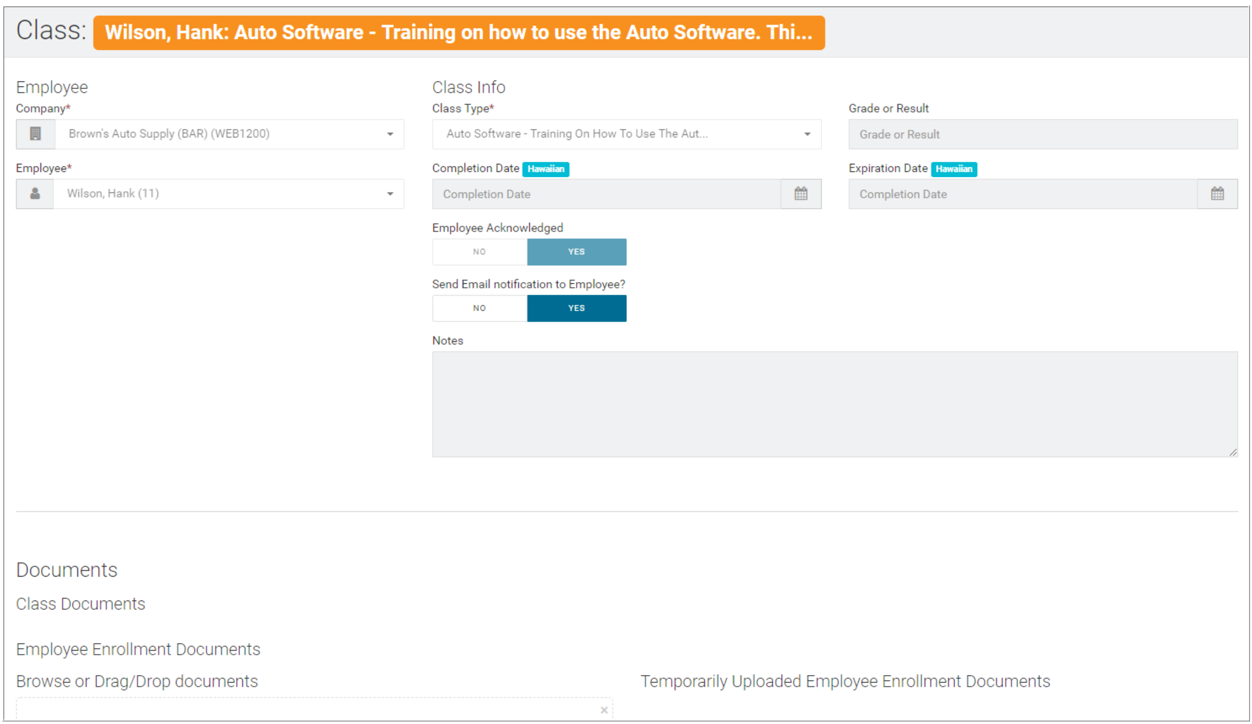
1. Go to **My HR – My Personal History – My Classes**.



2. The system displays the Classes dashboard screen where the employee will see the class name, date and time, and the location of any classes that they are assigned to.



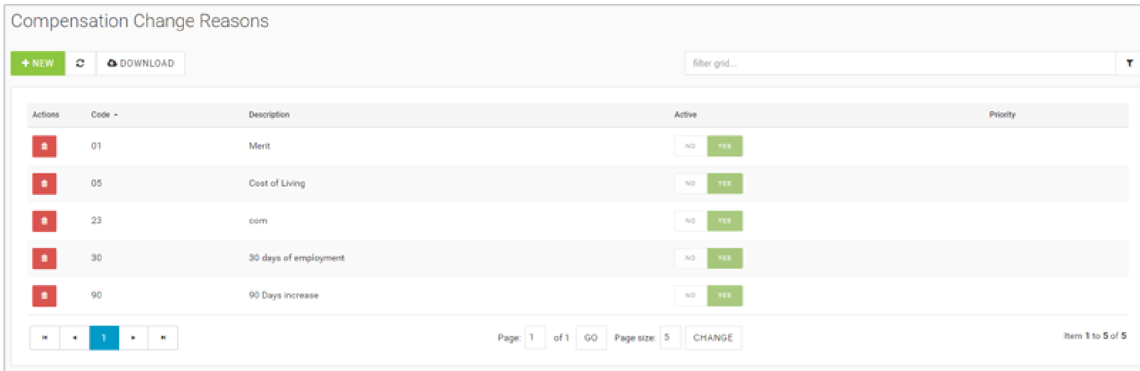
3. The employee can click on the Class row to display the details screen with more information about the class.



Compensation Change Reasons

The **Compensation Change Reason** code allows you to enter default reasons why an employee's compensation amount may have changed. Although the Compensation Change Reason is not a required field when you are updating an employee's compensation, the more information you can enter, the more informed everyone will be about why compensation changes were made.

You can indicate why an employee's compensation amount may have changed by setting up **Compensation Change Reason** codes.

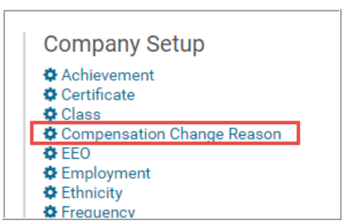


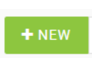
This section displays the following topics:

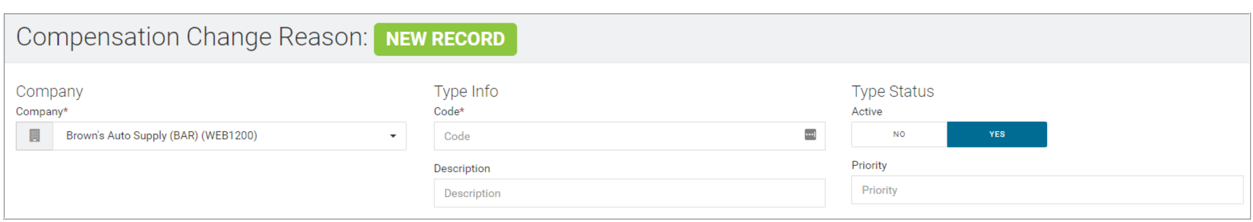
- Creating a Compensation Change Reason Code
- Using a Compensation Change Reason Code for an Employee
- Reporting on Compensation Change Reason Codes

Creating a Compensation Change Reason Code

1. To create a new Compensation Change Reason code, go to **HR Admin – Company Setup – Compensation Change Reason**.

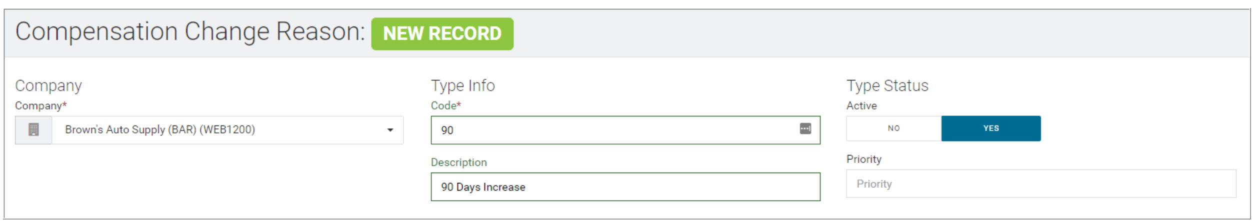


2. Click on the **+ New**  button and the system displays the **New Record** screen.



Complete the information on the **New Record** screen as described in the following table:

Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Create a code for the Compensation Change Reason. This is a required field.
Description	Enter a description for the Compensation Change Reason.
Type Status section	
Active	Set the **Active** Yes/No toggle switch to **Yes** to make this code active. To set the code to be inactive, set this to **No**.
Priority	This optional field is used to control the order of the values that display in the Compensation Change Reason dashboard. If left blank here, the values will be listed in alpha-numeric order.



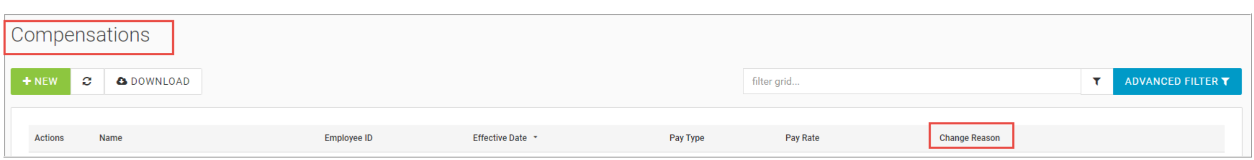
3. Click the **Save Changes** button .

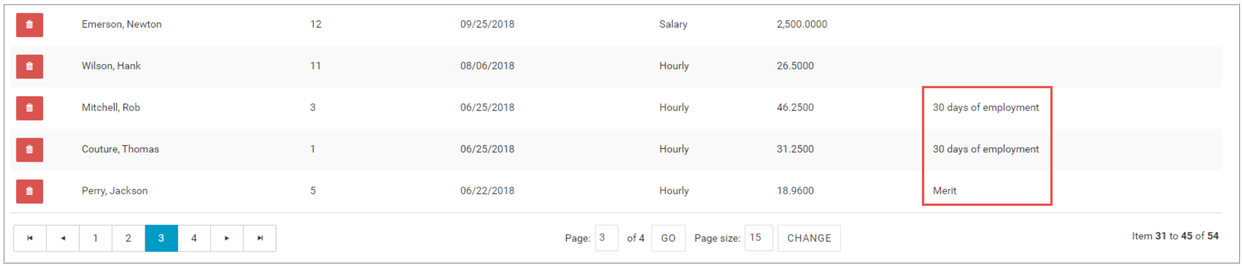
The Compensation Change Reason code you just added will now display on the Compensation Change Reason dashboard.

Using a Compensation Change Reason Code

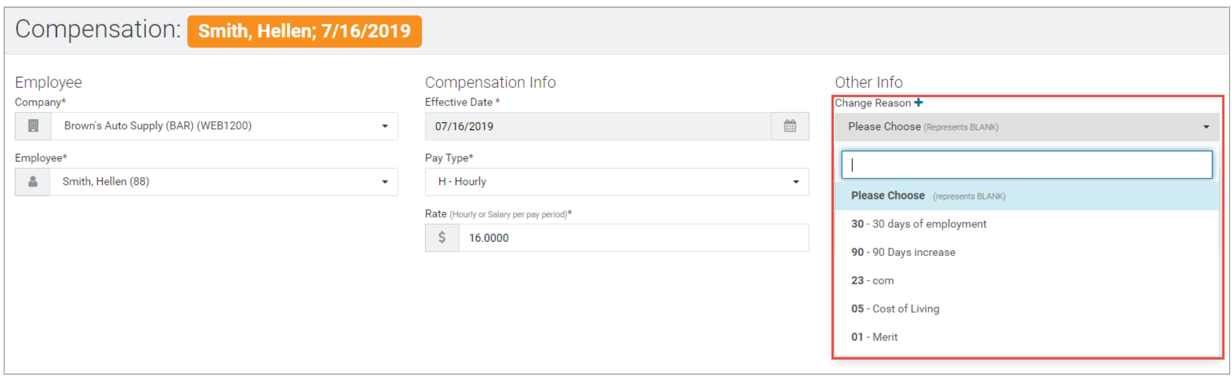
You use the Compensation Change Reason Codes when changing an employee's compensation:

1. Go to the **HR Admin – Employee Maintenance – Compensation** screen.





2. Click on the applicable employee row and on the **Compensation** details screen, in the **Change Reason** dropdown, the system displays the list of Compensation Change Reason codes that have been setup for the company.



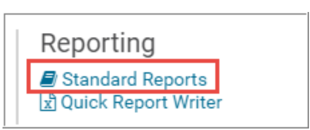
3. Select the appropriate Compensation **Change Reason** code for this employee's compensation change.

Note that if a Compensation Change Reason code for the reason you want to indicate has not been created, you can create one "on the fly" here (and then apply it) by clicking the blue plus sign on the **Change Reason** field.

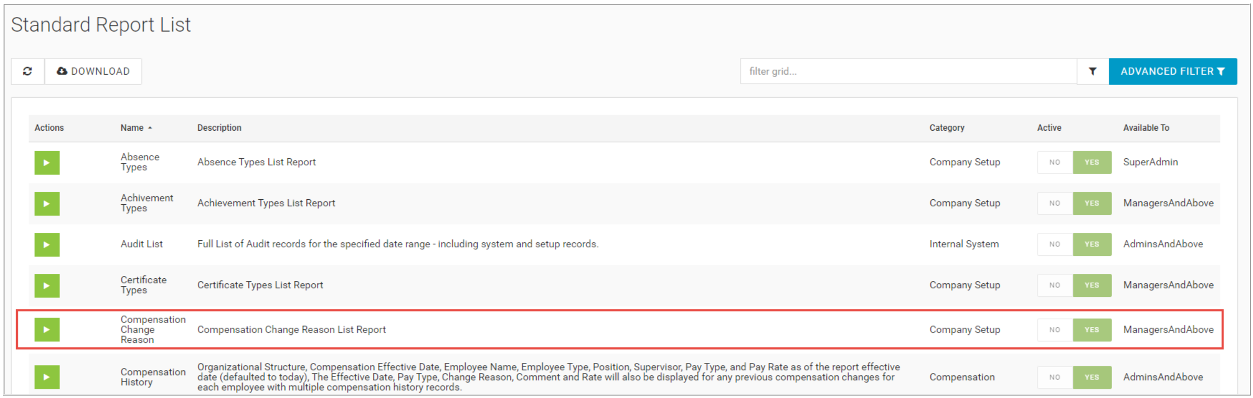
Compensation Change Reason List Report

To see reports related to compensation changes:

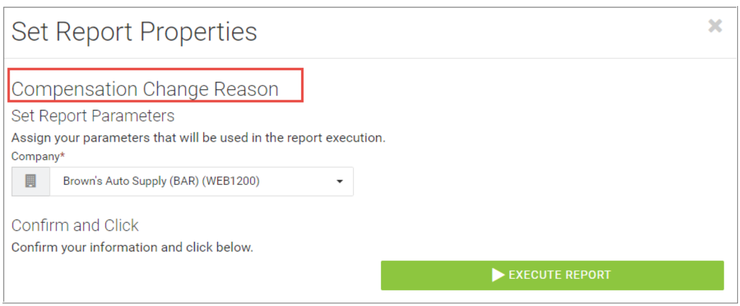
1. Go to **HR Admin – Reporting – Standard Reports**.



2. The system displays the **Standard Reports** screen. Scroll down to the **Compensation Change Reason** report.



3. Click the green arrow  and then click the **Execute Report** button. The report opens up in a new window.

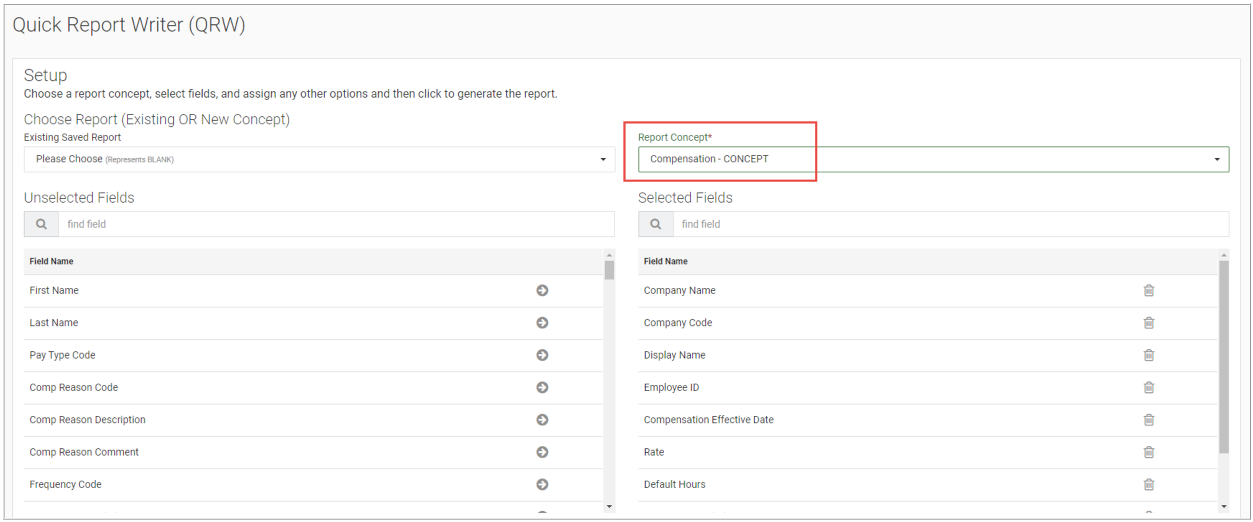


Confirm the information and then click the **Execute Report** button to run the report.

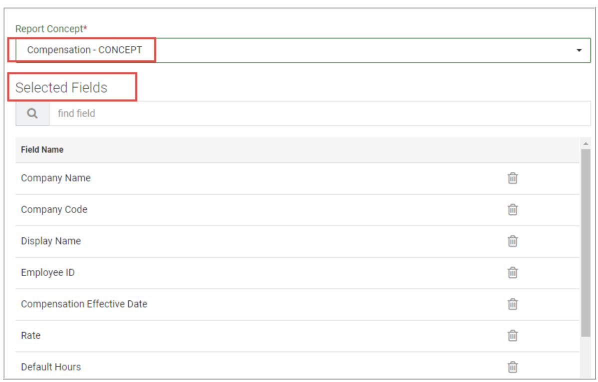
You can also use the **Quick Report Writer** to create custom reports related to Compensation:

1. Go to **HR Admin – Reporting – Quick Report Writer**.

2. The system displays the **Quick Report Writer** screen.



3. In the **Report Concept** field, select the **Compensation - Concept**.
4. The system then displays a list of compensation-related fields for use in your report.

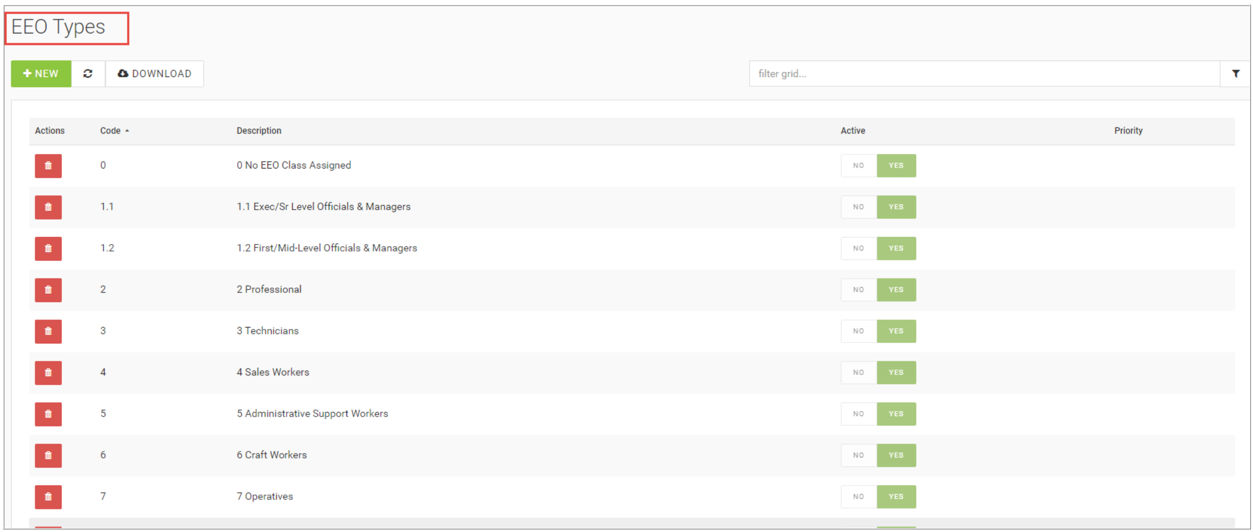


5. Click on the Trash Can icon to delete a selected field from the report. Add any additional fields from the **Unselected Fields** list on the left by clicking on the right arrow icon to move that field to the right.

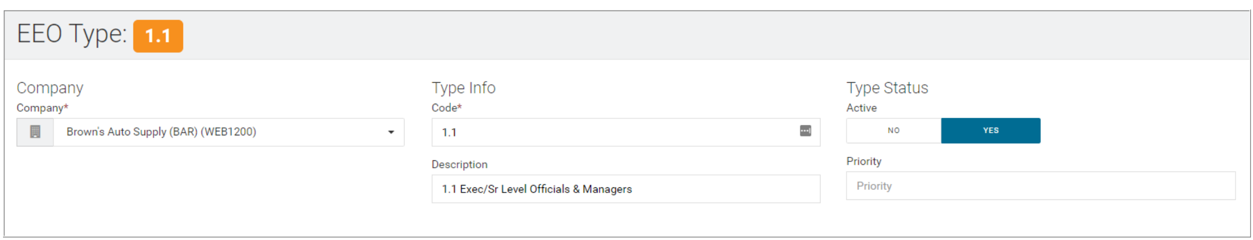
EEO Type

EEO Types reflect the Job Classification codes such as Professional, Service Workers, etc. They comprise a system for objectively and accurately defining and evaluating the duties, responsibilities, tasks, and authority level of a job. They may be used for the EEO-1 reporting requirements for companies with a certain number of employees.

Go to **HR Admin – Company Setup – EEO**.



Click on a row to get the details of an EEO Type.

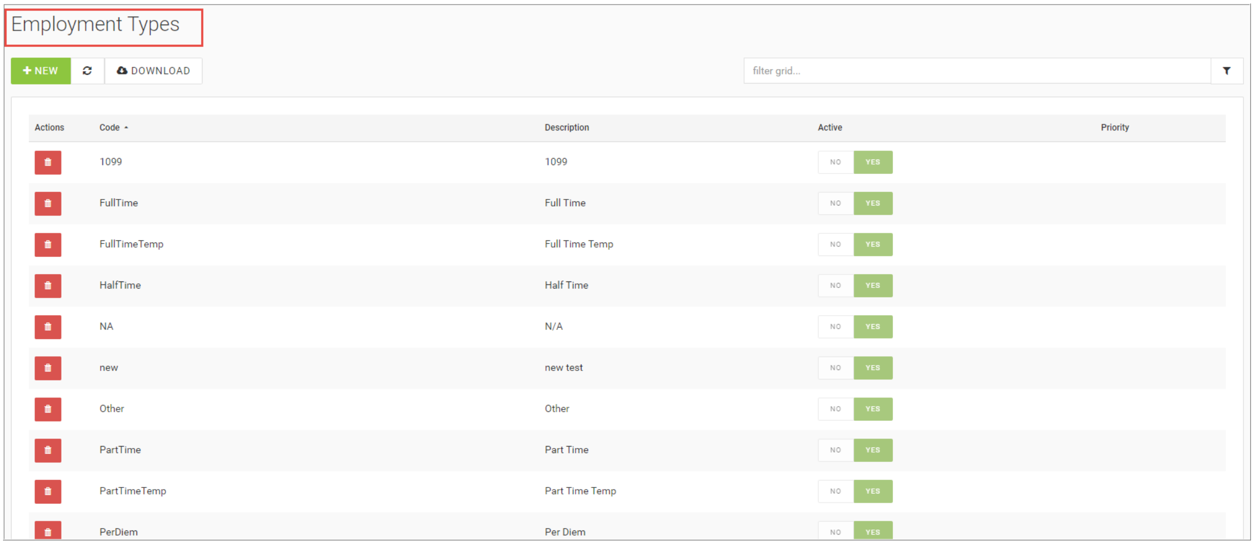


Warning: For now, do not create, edit, or delete an EEO Type in Advanced HR 2.0. EEO Types should only be created, edited, or deleted in Evolution. If you create an EEO Type in Advanced HR you will not be able to apply it to an employee.

Employment Type

Employment Types designate classifications of employees such as Full Time, Part Time, Seasonal etc.

Go to **HR Admin – Company Setup – Employment**.



Click on a row to view the details of an Employment Type.

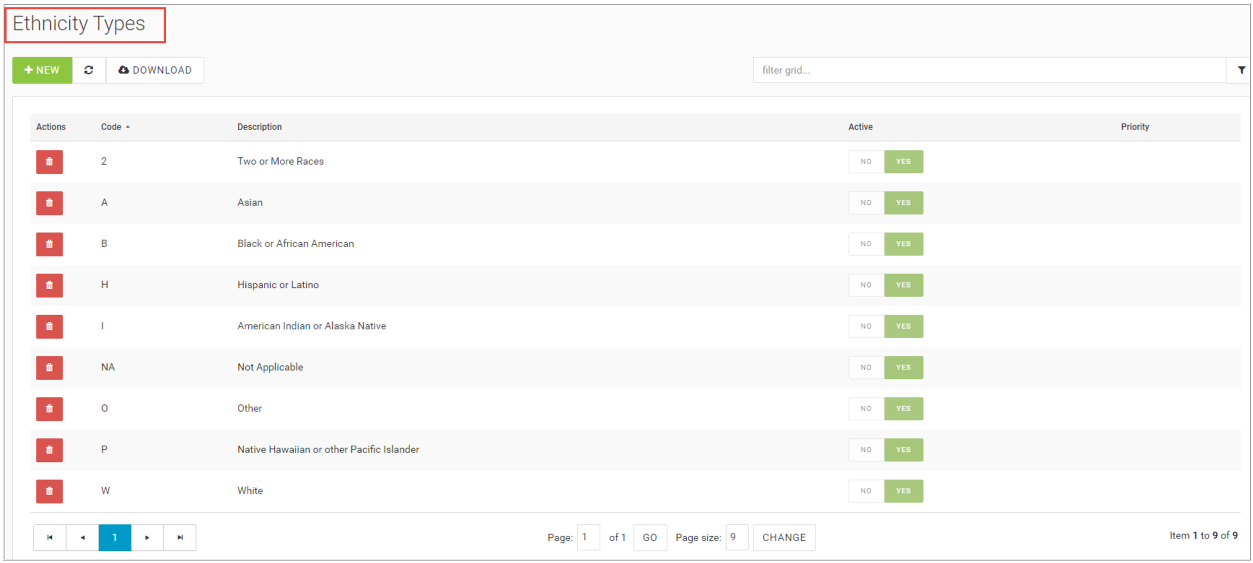
Warning: For now, do not create, edit, or delete an Employment Type in Advanced HR 2.0. Employment Types should only be created, edited, or deleted in Evolution. If you create an Employment Type in Advanced HR you will not be able to apply it to an employee.

Note: You can have the **Employment Type** value be defaulted in for any new hires on the **HR Admin – Company – Company List** screen.

Ethnicity Type

This is the employee's ethnicity for EEO reporting purposes.

Go to **HR Admin – Company Setup – Ethnicity**.


Ethnicity Types

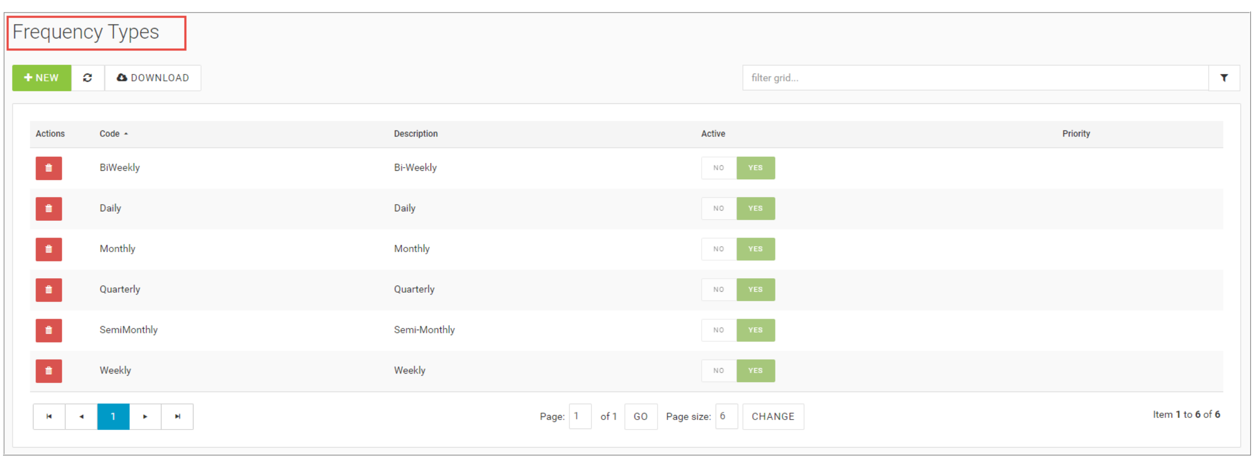
+ NEW | DOWNLOAD | filter grid...

Actions	Code	Description	Active	Priority
	2	Two or More Races	NO YES	
	A	Asian	NO YES	
	B	Black or African American	NO YES	
	H	Hispanic or Latino	NO YES	
	I	American Indian or Alaska Native	NO YES	
	NA	Not Applicable	NO YES	
	O	Other	NO YES	
	P	Native Hawaiian or other Pacific Islander	NO YES	
	W	White	NO YES	

1 | Page: 1 of 1 GO | Page size: 9 CHANGE | Item 1 to 9 of 9

Warning: For now, do not create, edit, or delete an Ethnicity Type in Advanced HR 2.0. Ethnicity Types should only be created, edited, or deleted in Evolution. If you create an Ethnicity Type in Advanced HR you will not be able to apply it to an employee.

Frequency Type

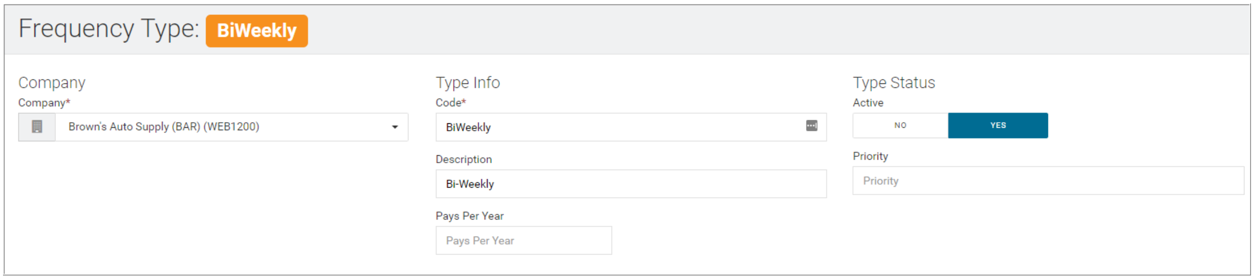

Frequency Types

+ NEW | DOWNLOAD | filter grid...

Actions	Code	Description	Active	Priority
	BiWeekly	Bi-Weekly	NO YES	
	Daily	Daily	NO YES	
	Monthly	Monthly	NO YES	
	Quarterly	Quarterly	NO YES	
	SemiMonthly	Semi-Monthly	NO YES	
	Weekly	Weekly	NO YES	

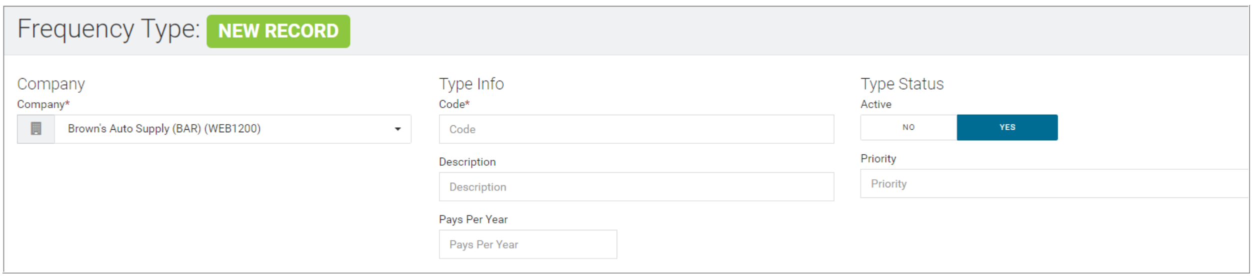
1 | Page: 1 of 1 GO | Page size: 6 CHANGE | Item 1 to 6 of 6

Click on a row to get the details of a Frequency Type.



To add a new Frequency Type, click on the **+ New** 

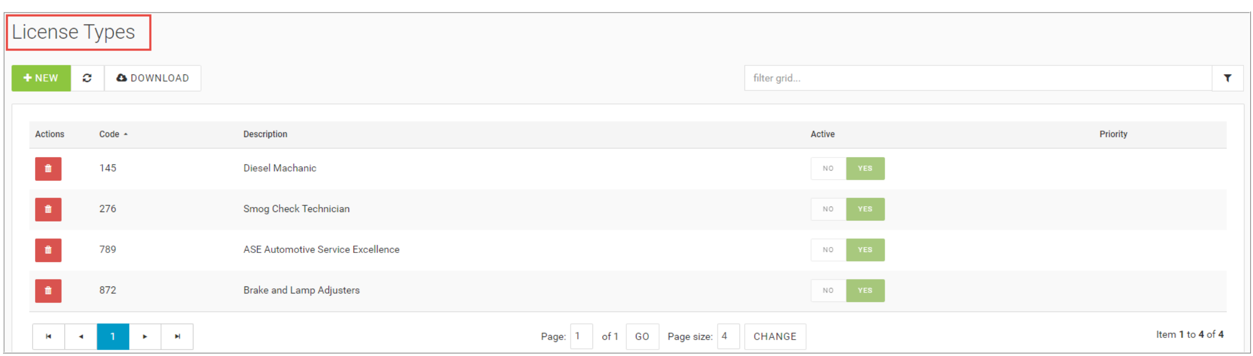
button. The system displays the **New Record** screen.



Warning: For now, do not create, edit, or delete a Frequency Type in Advanced HR 2.0. Frequency Types should only be created, edited, or deleted in Evolution. If you create a Frequency Type in Advanced HR you will not be able to apply it to an employee.

License Type

Create types of licenses that may be applicable to record for specific employees. Add details on any license including expiration dates and attached documents.



Creating a License Type

To create a new License Type:

1. Go to **HR Admin – Company Setup – License**.
2. The system displays the **License Type** screen which will display any existing License Types.
3. Click the **+ New** 

button. The system displays the **New Record** screen.

Complete the information on the screen as described in the following table:

Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Create a code for the License Type. This is a required field.
Description	Enter a description for the License Type.
Type Status section	
Active	Set the **Active** Yes/No toggle switch to **Yes** to make this code active. To set the code to be inactive, set this to **No**.
Priority	This optional field is used to control the order of the values that display in the License Types dashboard. If left blank here, the values will be listed in alpha-numeric order.

4. Click the **Save Changes** button 

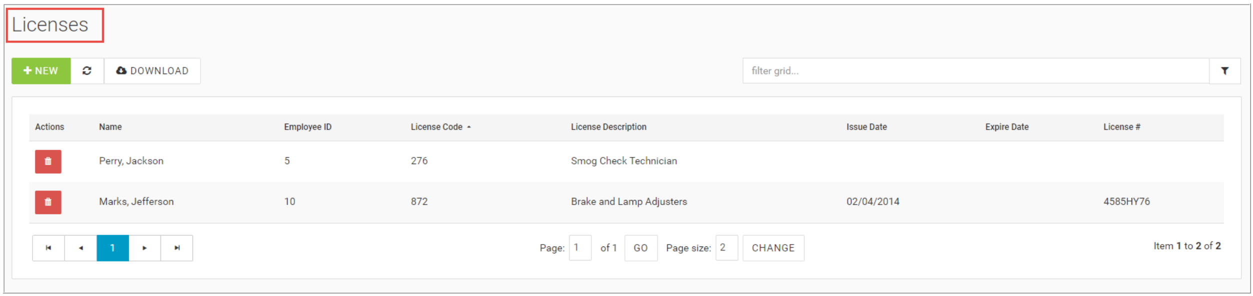
.

Recording a License for an Employee

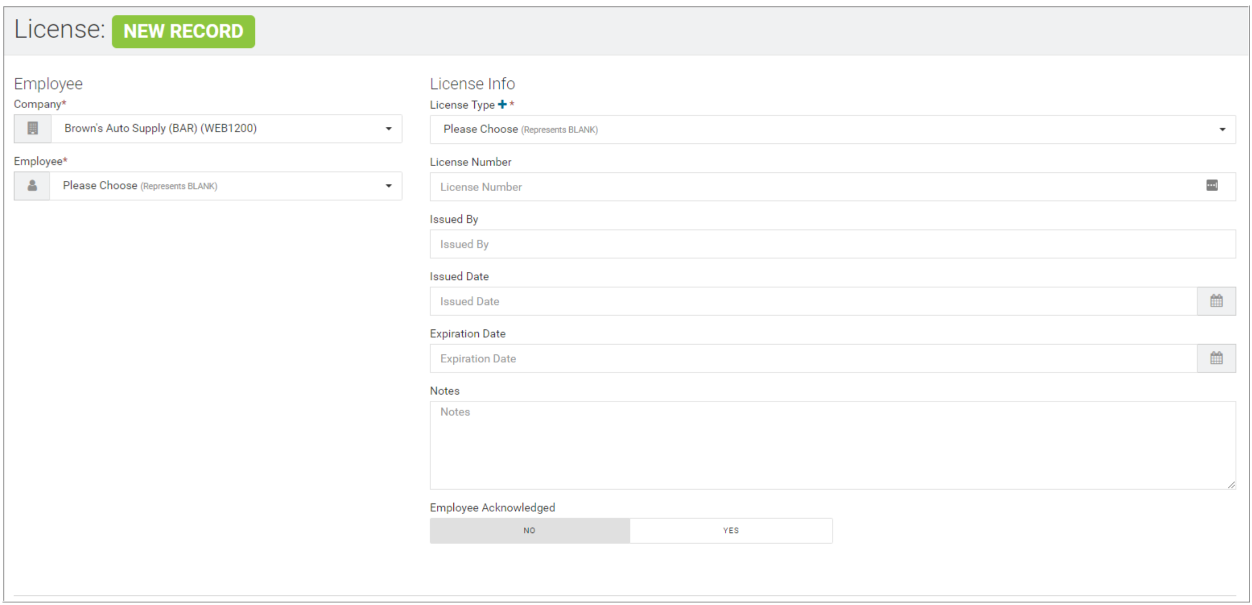
Once License Types have been set up, managers/admins can record an employee's license information.

To record a License for an employee:

1. Go to **HR Admin – Employee Maintenance – License** screen.
2. The system displays the **Licenses** screen.



3. Click the **+ New** + NEW button. The system displays the **New Record** screen.

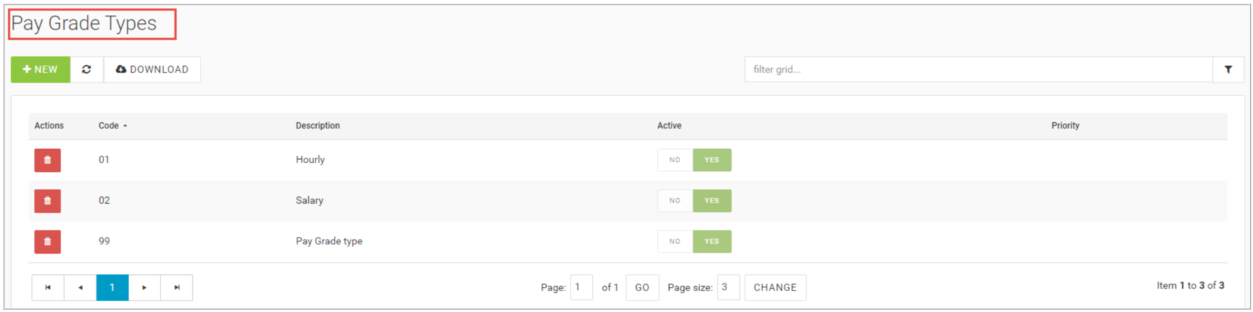


4. Select the **Company** and **Employee**, if not already selected.
5. Complete the information in the **License Info** section. Add any other information including attaching any related **Documents**.

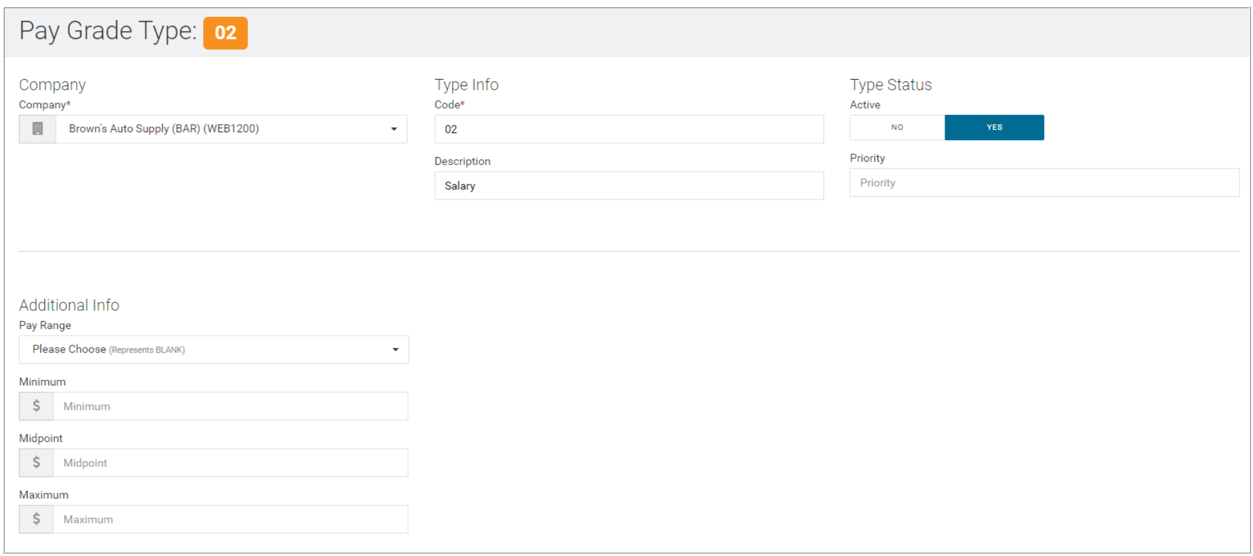
   The **License Type** dropdown here will display the License Type values you set up for this company on the **HR Admin – Company Setup – License** screen.

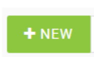
6. Click the **Save Changes** button SAVE CHANGES.

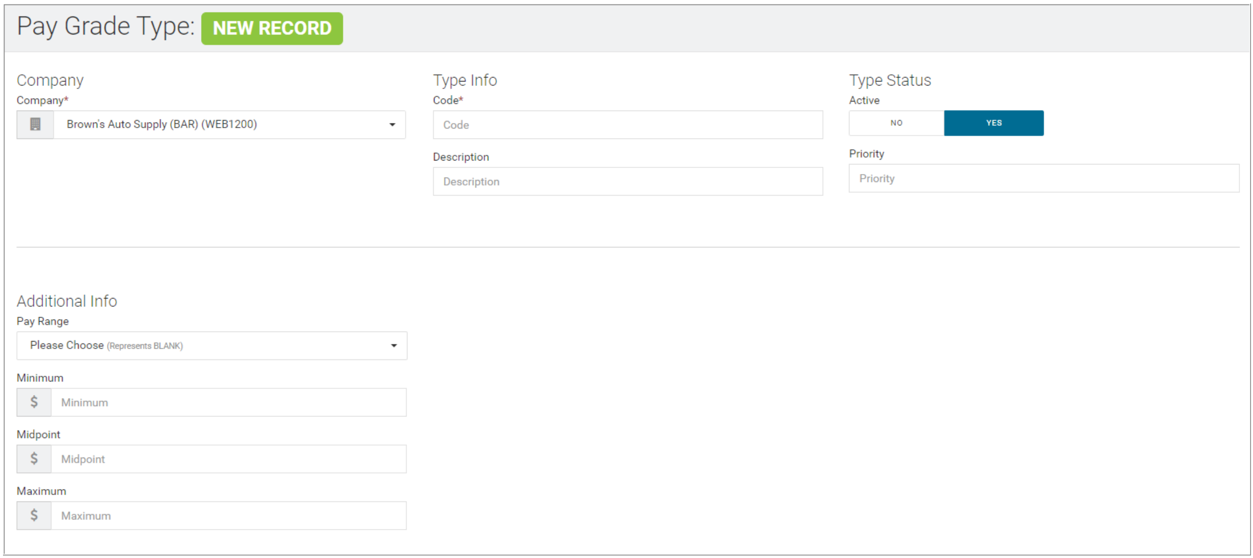
Pay Grade Type



Click on a Pay Grade type row to get the details.



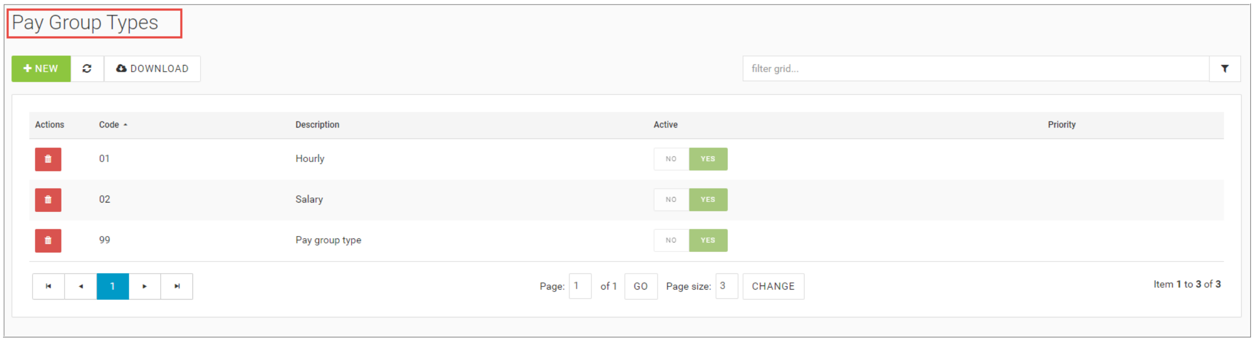
Click on the **+ New** button  to add a new Pay Grade Type. The system displays the **New Record** screen.



Complete the information on the screen as described in the following table:

Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Create a code for the Pay Grade Type. This is a required field.
Description	Enter a description for the Pay Grade Type.
Type Status section	
Active	Set the **Active Yes/No** toggle switch to **Active** to make this code active. To set the code to be inactive, set this to **No**.
Priority	This optional field is used to control the order of the values that display in the Pay Grade Type dashboard. If left blank here, the values will be listed in alpha-numeric order.
Additional Info section	
Pay Range	Select a **Pay Range** value, such as **Annual** or **Hourly**.
Minimum	Enter a minimum amount for this Pay Grade.
Midpoint	Enter a midpoint amount for this Pay Grade.
Maximum	Enter a maximum amount for this Pay Grade.

Pay Group Type



Click on a Pay Group row to display the details screen.

To create a new Pay Group Type, click on the **+New** button. The system displays the **New Record** screen.

Complete the information on the screen as described in the following table:

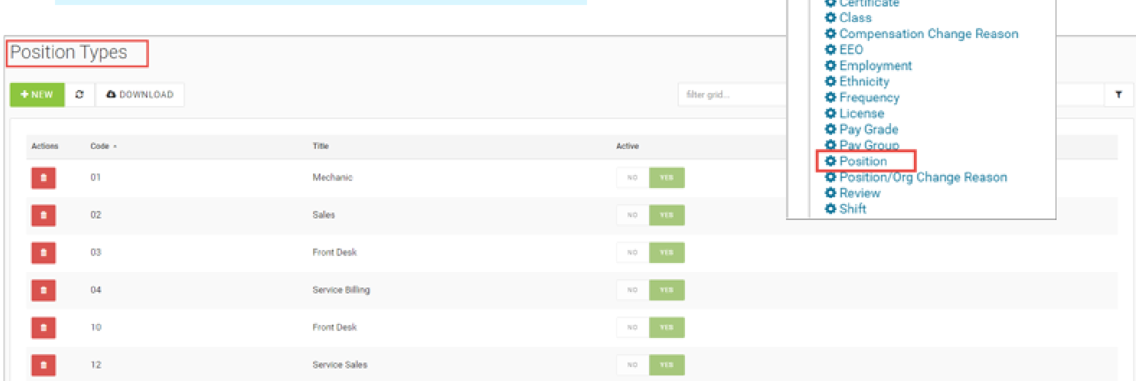
Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Create a code for the Pay Group Type. This is a required field.
Description	Enter a description for the Pay Group Type.
Type Status section	

Field / Button	Description
Active	Set the **Active Yes/No** toggle switch to **Active** to make this code active. To set the code to be inactive, set this to **No**.
Priority	This optional field is used to control the order of the values that display in the Pay Group Types dashboard. If left blank here, the values will be listed in alpha-numeric order.

Position Types

Note: Employees must have a position assigned to them in Advanced HR 2.0. Position Types are required when creating New Hires and for building an organizational structure.

The **Position Types Dashboard** displays all the positions for a company



Employees must have a position assigned to them in Advanced HR 2.0. The **Position** field from Evolution Classic, under **Employee – Employee, Details** does NOT flow from Classic into Advanced HR 2.0 currently. Position Types are required when creating New Hires and for building an organizational structure.

The positions can be specific or a generic space filler position to be assigned later. Once the Payroll Cutover has completed, you can create the Positions in Advanced HR 2.0 in **Company Setup – Position**, and then assign the position to the employee records in **Employee Maintenance – Employee Detail**.

This section will discuss the following topics:

- What positions are
- Setting up a position
- Assigning a position to an employee
- Reporting on positions

What are Positions?

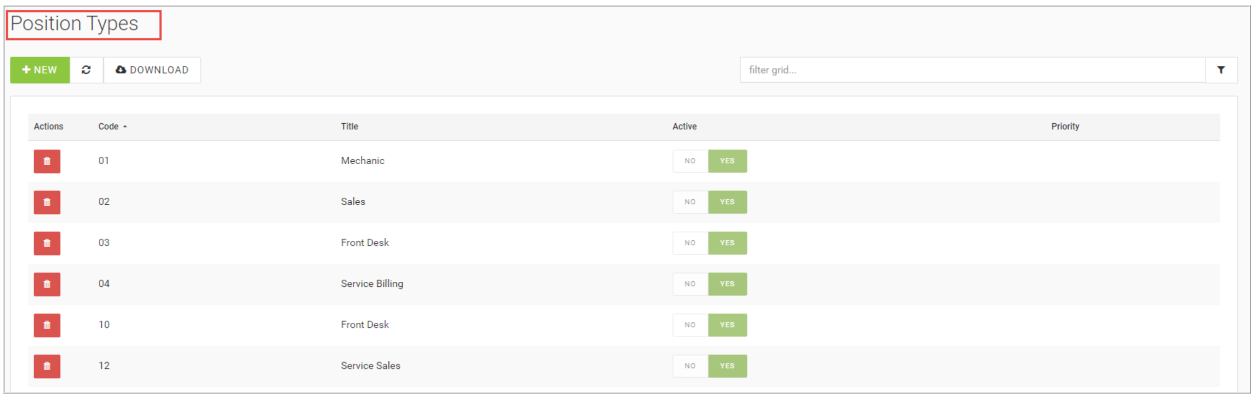
Positions are job titles used in Advanced HR 2.0 to classify employees into groups and are a key setup for Applicant Tracking.

Note: Because Position is a required field, it is one of the first items that should be setup when implementing Advanced HR.

Setting Up a Position

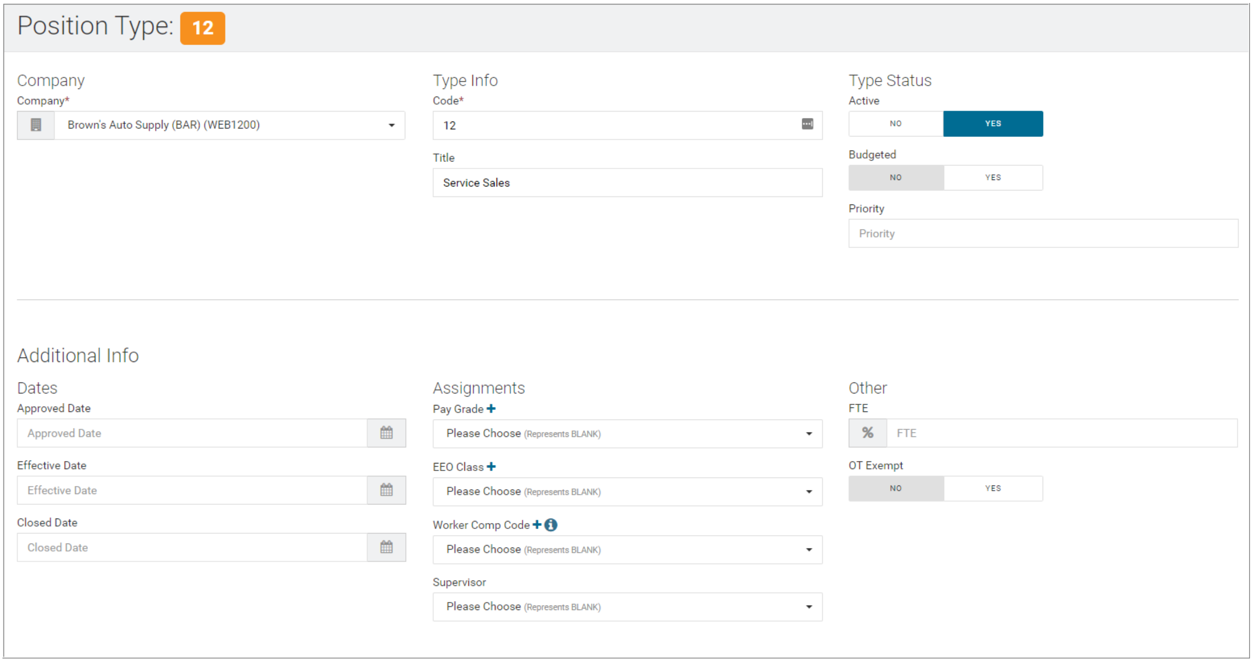
To setup Position Types in Advanced HR 2.0, do the following:

1. Go to **HR Admin – Company Setup – Position**.
2. The system displays the **Position Types** dashboard. The dashboard will display any existing positions for a company.

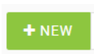


Note: It's important to remember that if no company is selected when displaying the Position Types screen, the user will see all the positions for all the companies that have been cutover.

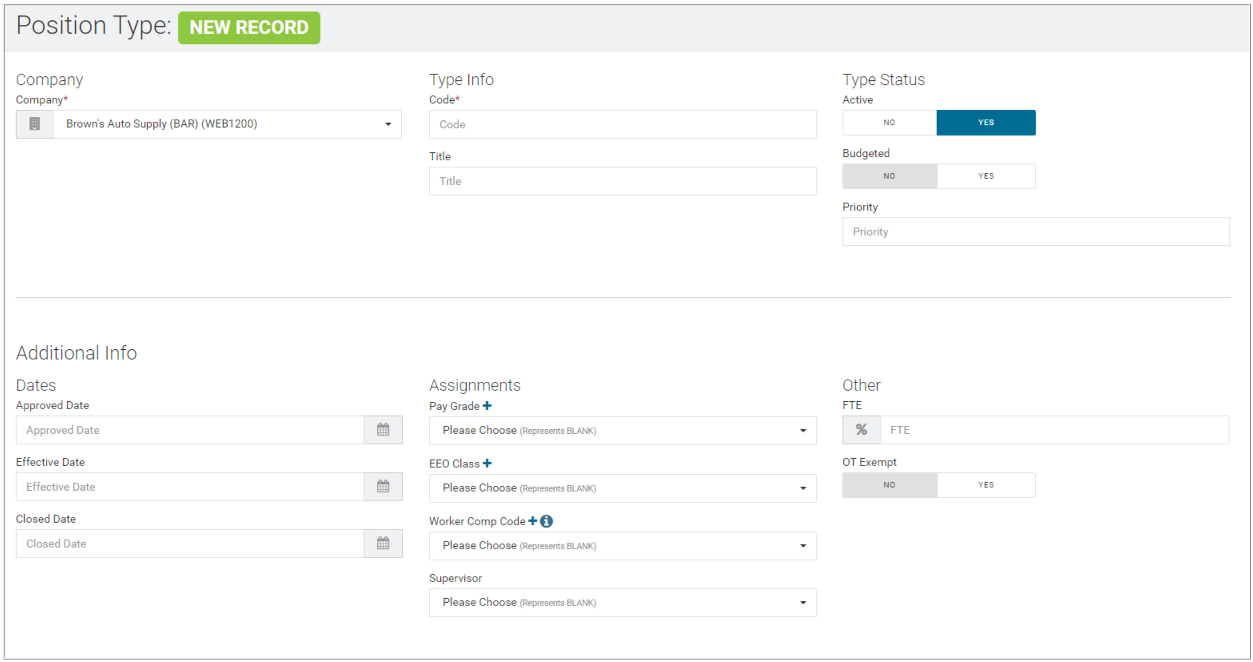
As you can see above, this company already has some positions. The user can view and edit a position at any time simply by clicking on the Position row and going to the details screen.



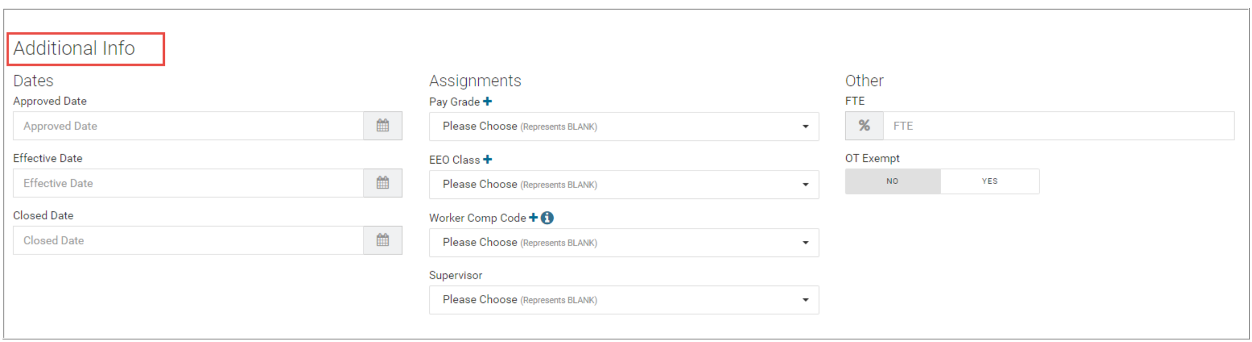
To Create a New Position

1. Go to **HR Admin – Company Setup – Position**.
2. Click the **+ New** button 

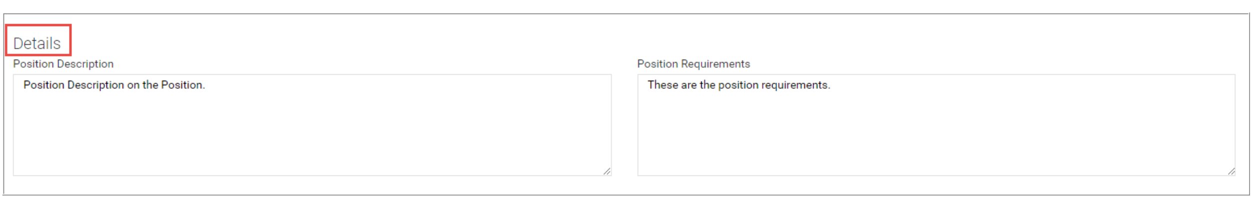
.
3. Verify that you're on the correct **Company**.
4. Create a **Code** (required field).
5. Give your Position a **Title** (required field).
6. **Active** Status is toggled to **Yes** by default. You can inactivate the position at any time by changing this to **No** if wanted.



The remaining fields in the **Additional Info** section are not required when you are first setting up a position; however, they are very useful if you will be using Applicant Tracking. These fields can be set up and used at a later time if needed.



7. You can add **Dates** (including **Effective Dates**).
8. Create **Pay Grades** and assign a **Supervisor**.
9. Make the position **Exempt from Overtime**.
10. Add a Position (Job) **Description** and **Requirements** in the **Details** tile:



These Details fields can be used with Applicant Tracking to help generate your job postings.

Note: Changing a position's Workers Compensation Code will not cascade to Employees with that Position

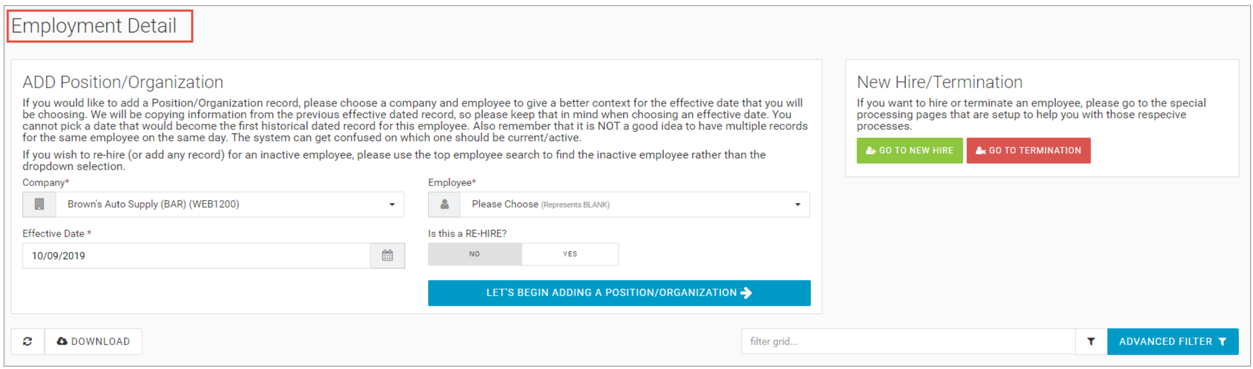
11. Click **Save Changes** when you complete all needed fields.

Once all positions have been created, they should be assigned to all the employees in the company.

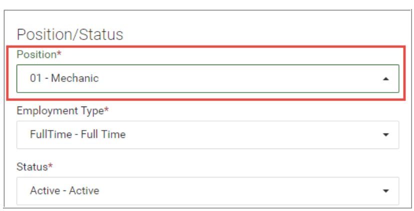
Assigning a Position to an Employee

To assign a position to an employee:

1. Go to **HR Admin – Employee Maintenance – Employment Details**.
2. The system displays the **Employment Details** screen.



3. If you are adding a position to an employee after the implementation of Advanced HR, at the bottom of the screen, click on the employee line for the person you want to add the position to.
4. The system displays the details screen for that employee. In the **Position/Status** section of the screen, in the **Position** dropdown, assign the appropriate position to the employee.

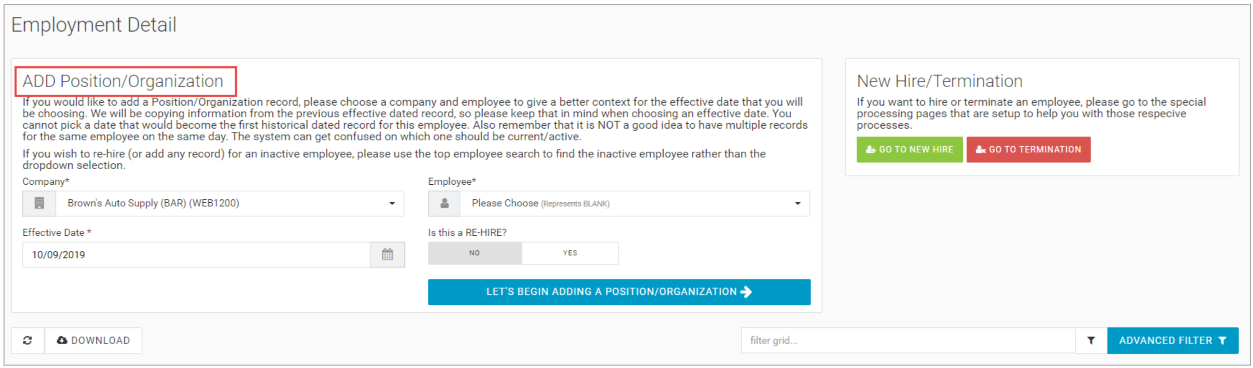


5. Click the **Save Changes** button.

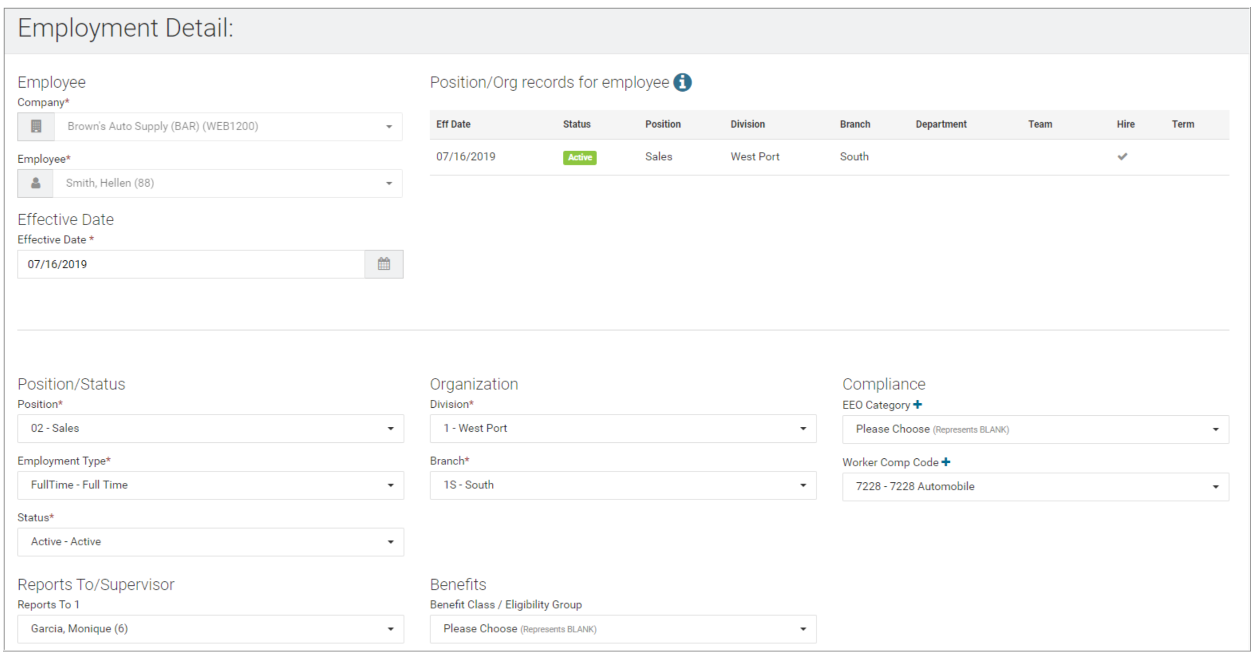
If there are other employees who also have this position, add the position to each employee. Some employees may have more than one position line for each Status in Advanced HR.

Updating an Employee to a New Position

If you are updating an employee to a new position, you do this action from the **Add Position/Organization** section of the **Employment Detail** screen.



1. Select the **Employee** and the **Effective Date** for the new position.
2. Click the **Let's begin adding a Position/Organization** button.
3. The system displays the details screen for that employee,



4. Update the employee's current position with the new position.
5. At this time, you can also make other updates to the employee as needed, such as the **Division** and **Branch** in the **Organization** section.

Note: All changes will be Effective Dated to the date entered on the Position/Organization screen. We also recommend that you enter a reason for the change when making a position change.

6. Click the **Save Changes** button.

Reporting on Positions

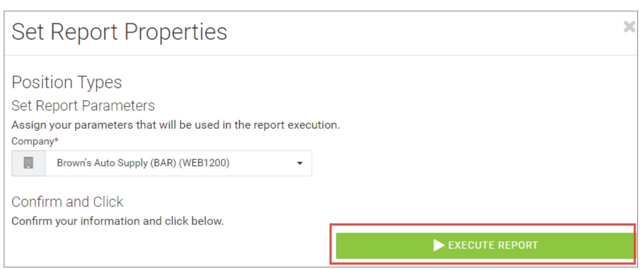
You can run a Standard Report to list the positions and you can also create a custom positions report.

Standard Report for Positions

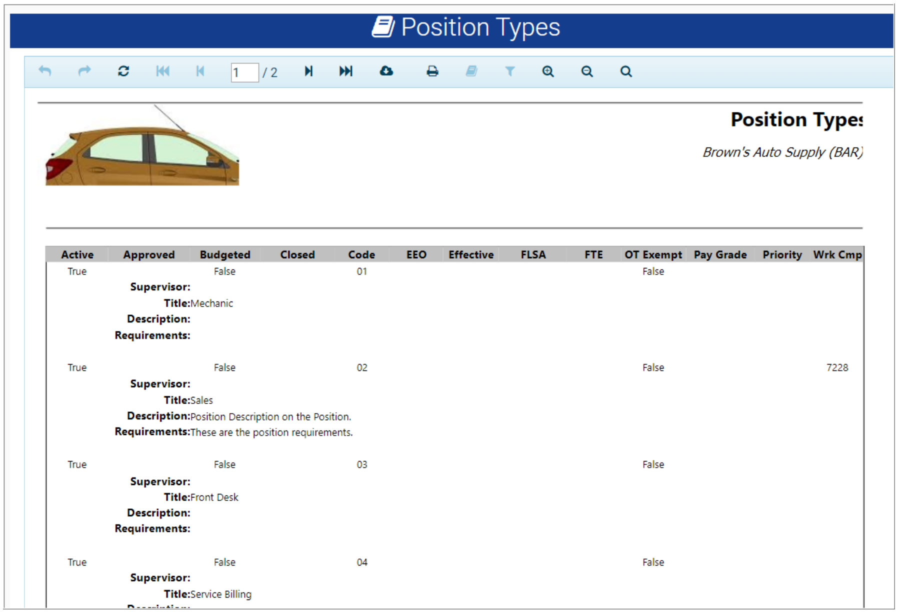
You can run a standard report for positions which will list all of the created positions for a company along with information that has been completed for each position.

1. Go to **HR Admin – Reporting – Standard Reports**.
2. The system displays the **Standard Reports** screen.
3. Scroll down to the **Positions Types Report** row.

4. Click on the green Execute report arrow icon on the row.
5. The system displays the **Set Report Properties** screen.



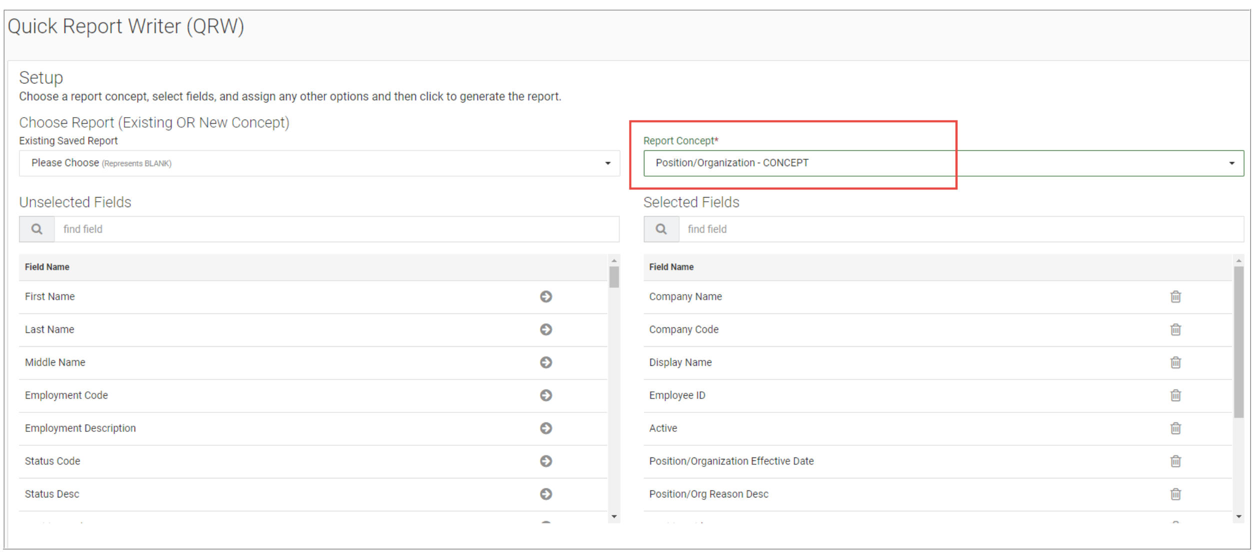
6. Make sure the company is selected and click the **Execute Report** button.
7. The system displays the **Position Types** report in another window.



Custom Report for Positions

You can create a custom report for positions using the Quick Report Writer (QRW) tool for tracking the positions for each employee.

1. Go to **HR Admin – Reporting – Quick Report Writer (QRW)**.
2. The system displays the **Quick Report Writer (QRW)** screen.



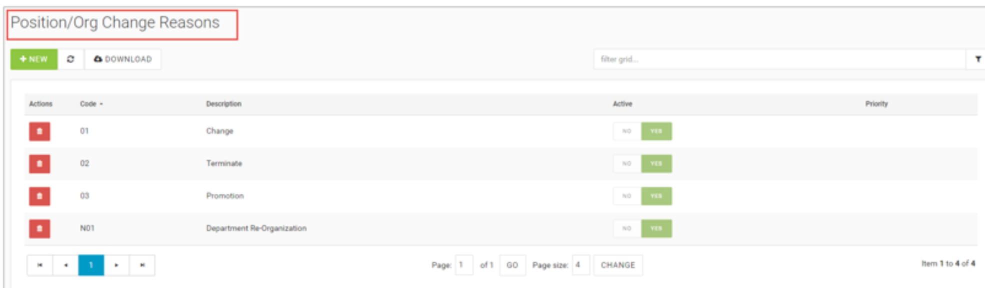
3. In the **Report Concept** dropdown, select the **Position/Organization – Concept** and select the fields you want to include in the report.

Position/Org Change Reason

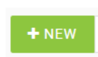
Position/Org Change Reason allows the user to create and set job designations that are tied to:

- Work environment
- Job duties
- New initiatives

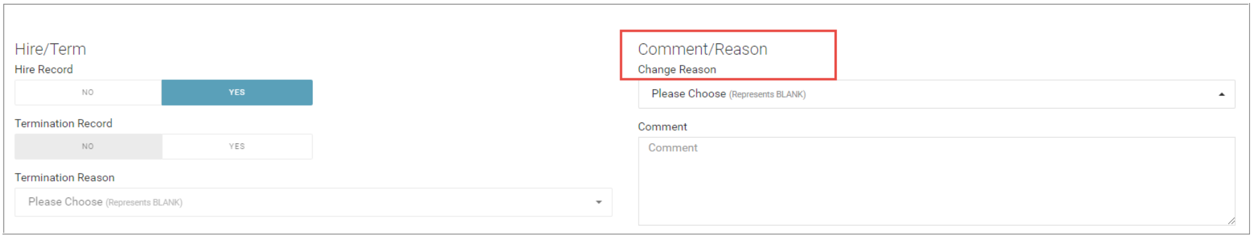
For example, a Security Guard position could be changed due to a re-organization of management structure.



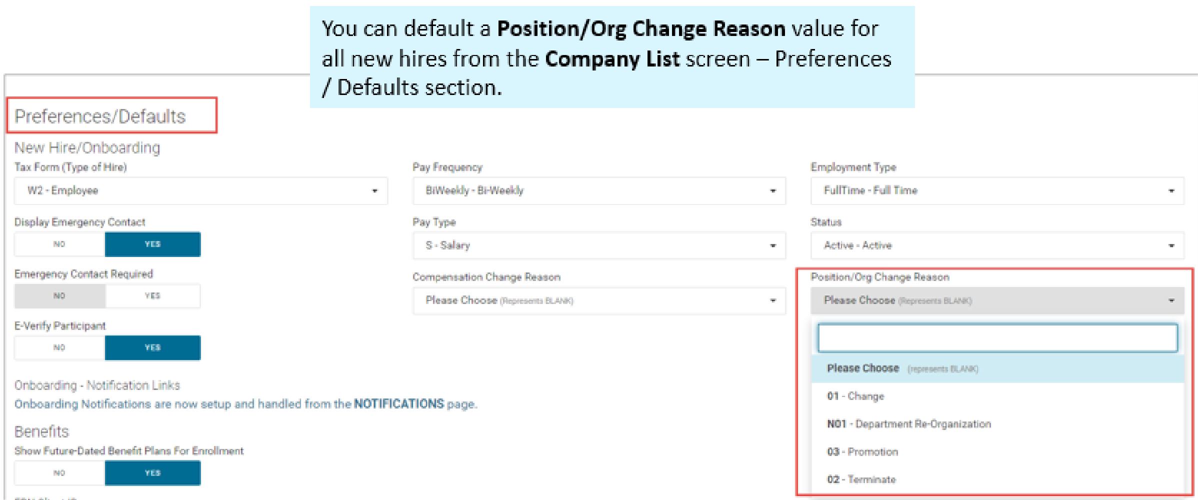
Click on a row in the summary screen to display the details of the Position/Org Change Reason.

To create a new Position/Org Change Reason record, click the **+ New** button  .

Position/Org Change Reason code values, once setup, can be used to specify the reason for position change for an employee on the **Employment Details** screen, in the **Comment Reason** section of the screen, in the **Change Reason** dropdown, as shown below.



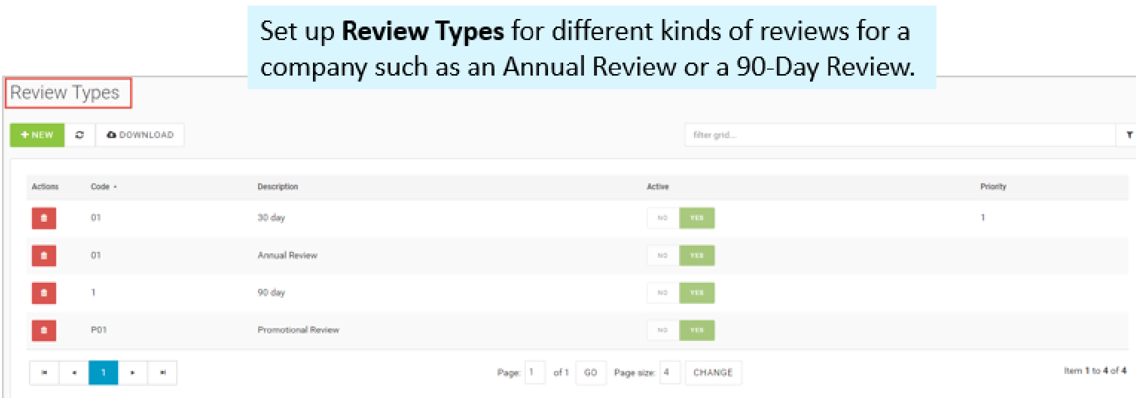
It’s important to note that a Position/Org Change Reason value can be **set by default for all new hires**. You can do this on the **HR Admin – Company – Company List** screen, by selecting an option in the **Preferences/Defaults** – **New Hire Onboarding** section in the **Position/Org Change Reason** dropdown.



Review Type

Review Types are the names or categories given to different kinds of reviews for a company to use in the performance review process. For example:

- An annual review
- A 90-Day review



Each review type might have a different reviewer, template/document, or timeline associated with it. Review templates can be added to each review type to improve policy compliance and facilitate administration of reviews.

This section will discuss the following topics:

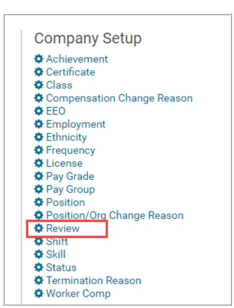
- Setting up a review type
- Assigning a review to an employee
- The Manager and Employee view of reviews
- Reporting on reviews

Review Types are assigned to an employee on the **HR Admin – Employee Maintenance – Review** screen.

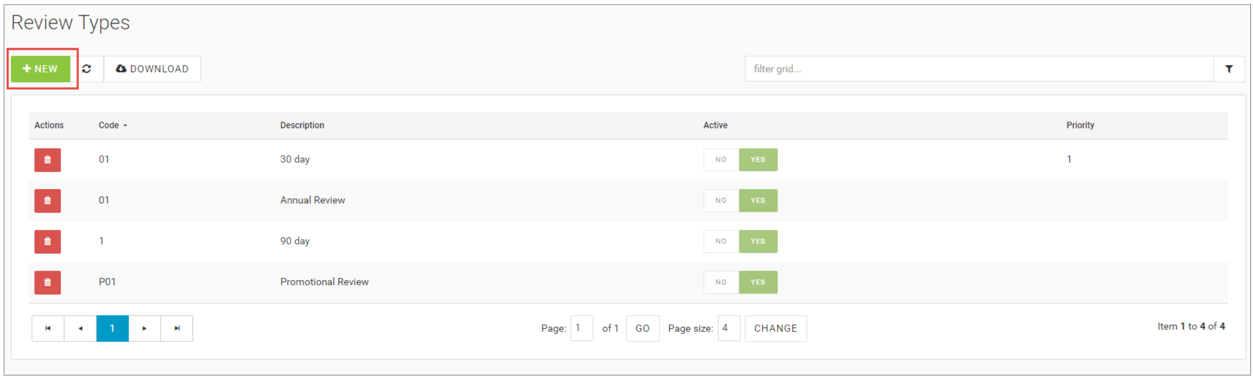
Setting Up a Review Type

To create a new review type:

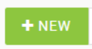
1. Go to **HR Admin – Company Setup – Review**.

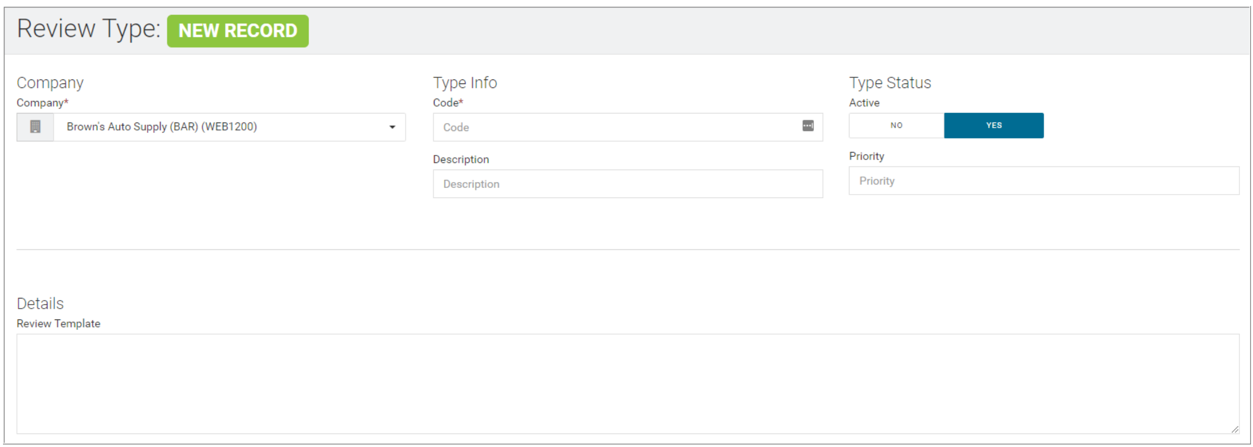


2. The system displays the **Review Types** dashboard.



The **Review Types** dashboard displays any existing review types. Click on a review type row to display more details about that review type.

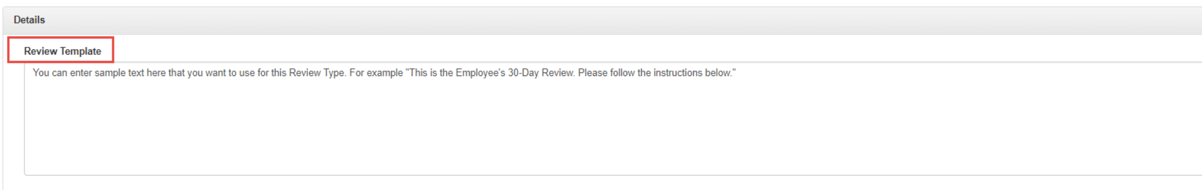
3. Click on the **+ New** button  to create a new review type.
4. The system displays the **Review Type New Record** screen.



Complete the information on the **New Record** screen as described in the following table:

Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Enter a code for the Review Type. This is a required field.
Description	Enter a description for the Review Type.
Type Status section	
Active	Set the **Active Yes/No** toggle switch to **Active** to make this code active. To set the code to be inactive, set this to **No**.

Field / Button	Description
Priority	This optional field is used to control the order of the values that display in the Review Types dashboard. If left blank here, the values will be listed in alpha-numeric order.
Details section	
Review Template	Any text you enter in the Review Template section here will appear when you are assigning and scheduling a review to an employee using the **HR Admin – Employee Maintenance – Reviews** screen.



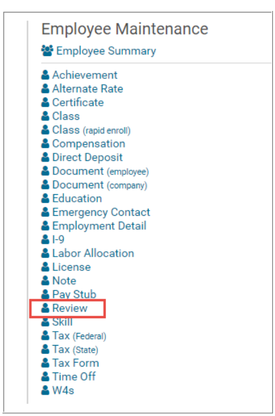
5. In the **Details** section of the screen, you can enter text to use as a **Review Template**.
6. Click the **Save Changes** or **Save and Next Record** button if you are creating multiple Review Types.

The system then returns you to the **Review Types** dashboard and will now display the new Review Type you just created.

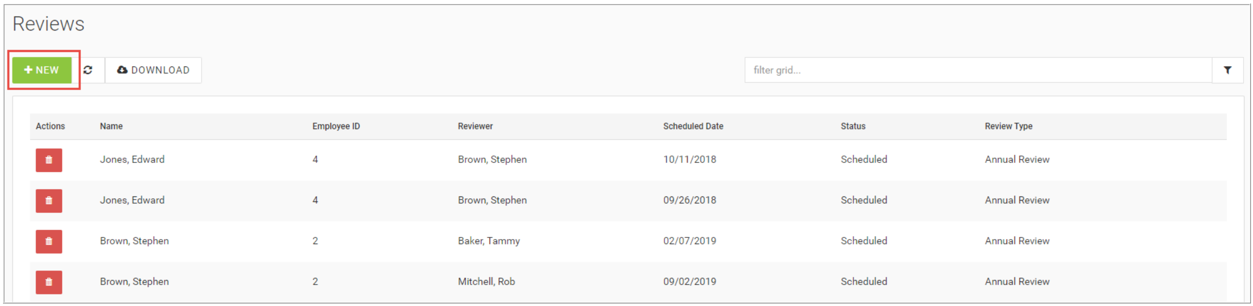
Assigning and Scheduling a Review to an Employee

To assign and schedule a review for an employee:

1. Go to **HR Admin – Employee Maintenance – Review**.

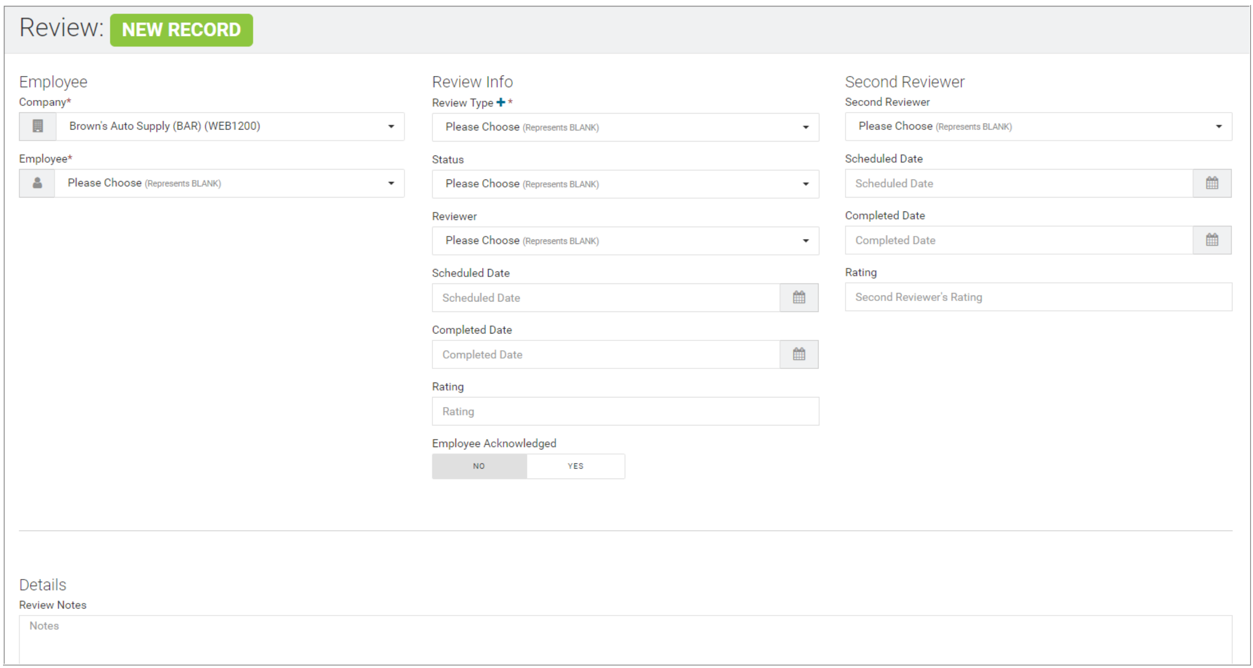


2. The system displays the **Reviews** dashboard.



Actions	Name	Employee ID	Reviewer	Scheduled Date	Status	Review Type
	Jones, Edward	4	Brown, Stephen	10/11/2018	Scheduled	Annual Review
	Jones, Edward	4	Brown, Stephen	09/26/2018	Scheduled	Annual Review
	Brown, Stephen	2	Baker, Tammy	02/07/2019	Scheduled	Annual Review
	Brown, Stephen	2	Mitchell, Rob	09/02/2019	Scheduled	Annual Review

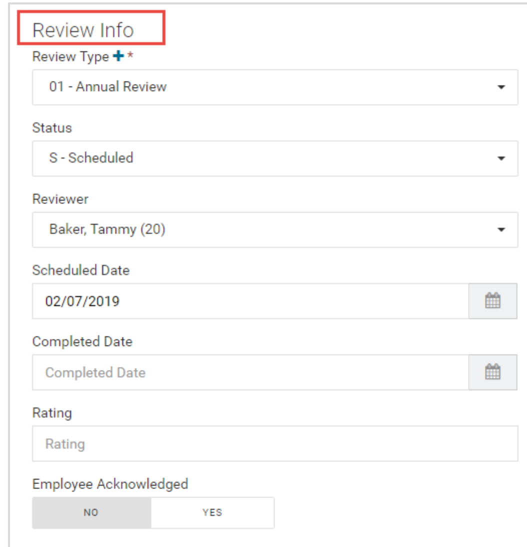
3. Click on the **+ New** button **+ NEW**.
4. The system displays the **Review New Record** screen.



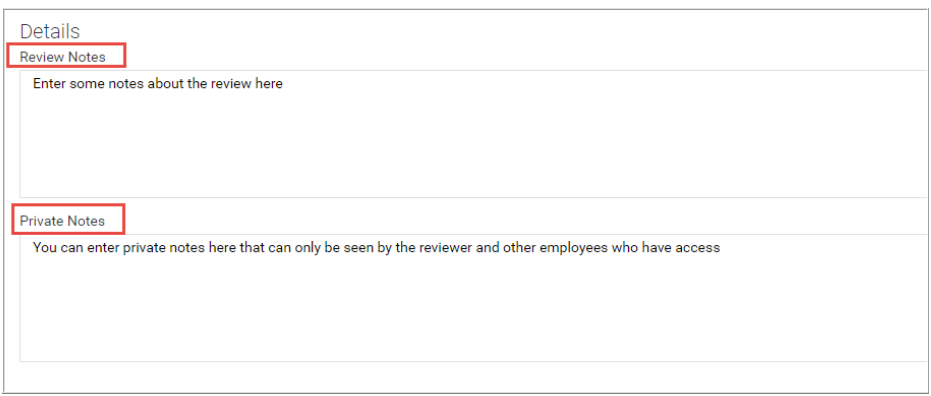
5. If you are not already locked on to an employee, select the employee now from the **Employee** dropdown.

6. In the **Review Info** section, select the **Review Type** from the dropdown.

   If the Review Type you need does not exist, you can click the blue Plus sign and create a new Review Type here 'on the fly.'

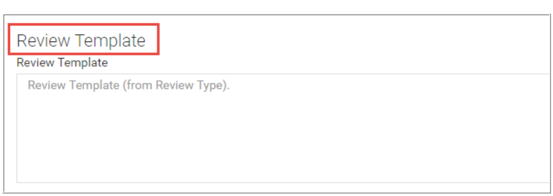


7. In the **Status** dropdown, indicate the current status of the review. When first scheduling a review, you would select the **S – Scheduled** Status.
8. Select the person who will conduct the review in the **Reviewer** dropdown.
9. Select the **Scheduled Date**. This field is not required here now and can be entered or changed later.
10. Once the review has been completed, you can return to this screen to enter the **Completed Date** and the **Rating**.
11. The **Employee Acknowledged** toggle will change from **No** to **Yes** if a Notification has been sent to the employee and the employee acknowledged receiving it. To learn more, refer to the *Notifications* section of this guide.
12. If needed, complete the **Second Reviewer** section.
13. In the **Details** section, you can enter **Review Notes** and **Private Notes**.

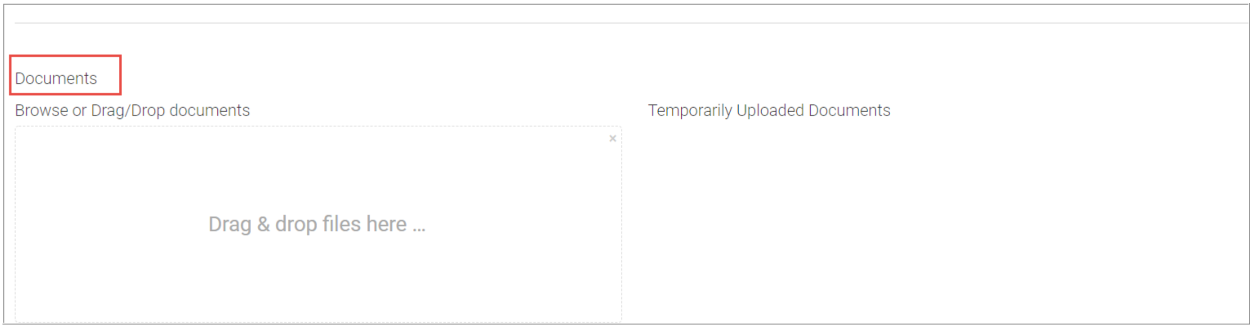


The **Review Notes** can be viewed by the Employee.
The **Private Notes** can be only be seen by the Reviewer and employees who have access to the Employee Maintenance Review.

14. The **Review Template** section here will display any review template information that was populated by the Admin on the **Review Type** creation screen (**HR Admin – Company Setup – Review**).



15. In the **Documents** section, you can upload any needed documentation for the employee's review and this can be done at any time – before, during, or after the review.



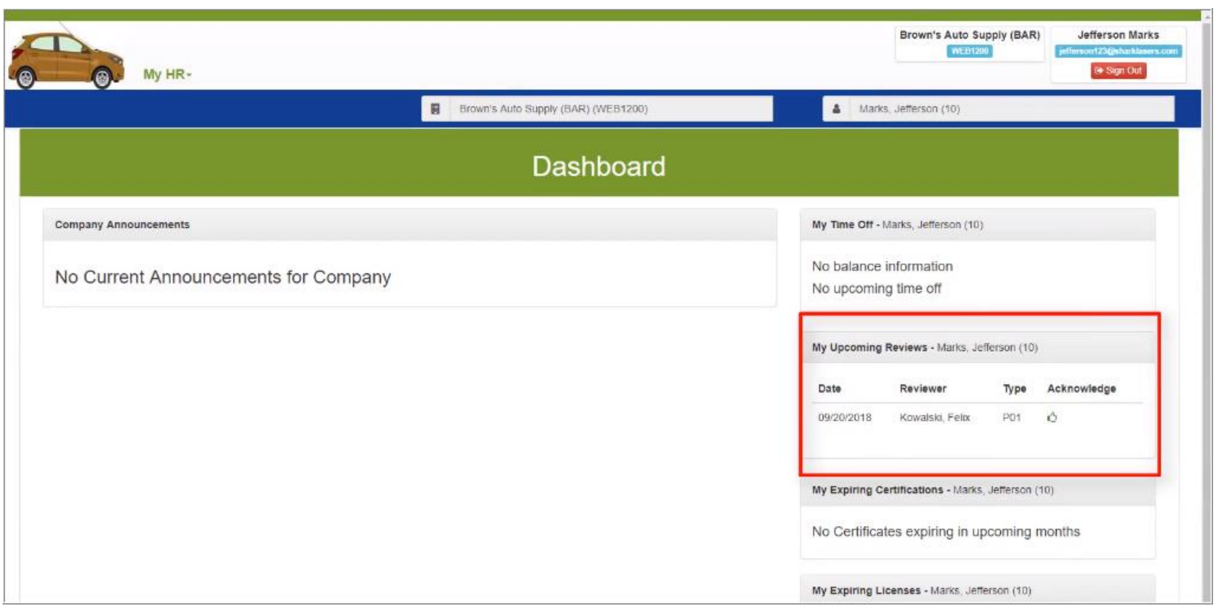
16. When complete, click the **Save Changes** button SAVE CHANGES.

The system returns you to the **Reviews** dashboard.

The Employee View of the Review

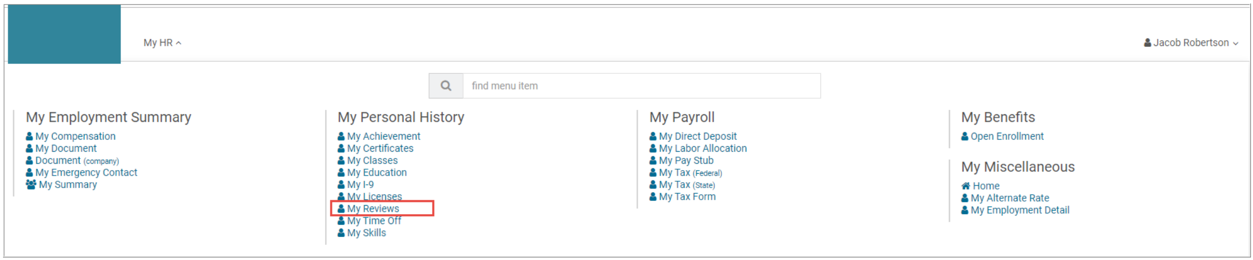
The employee can sign in to the system to view their review:

1. The employee displays their company **Dashboard**.
2. On the employee's **Dashboard**, there is a **My Upcoming Reviews** section on the right side of the Dashboard that displays any of their upcoming reviews at a glance.

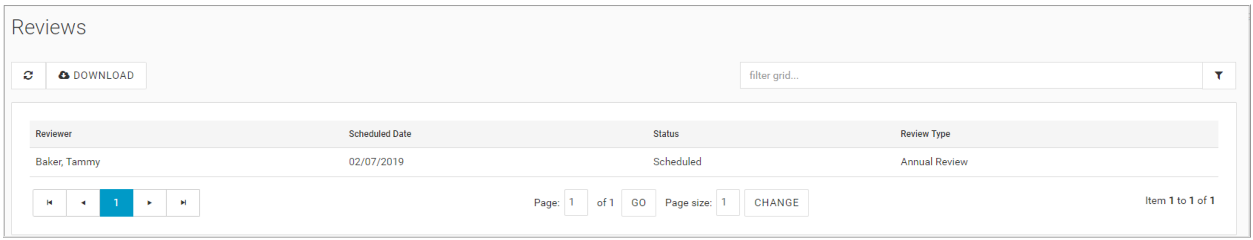


Another location the employee can see their review history is by going to their **My HR** screen:

1. Go to **My HR – My Personal History – My Reviews**.



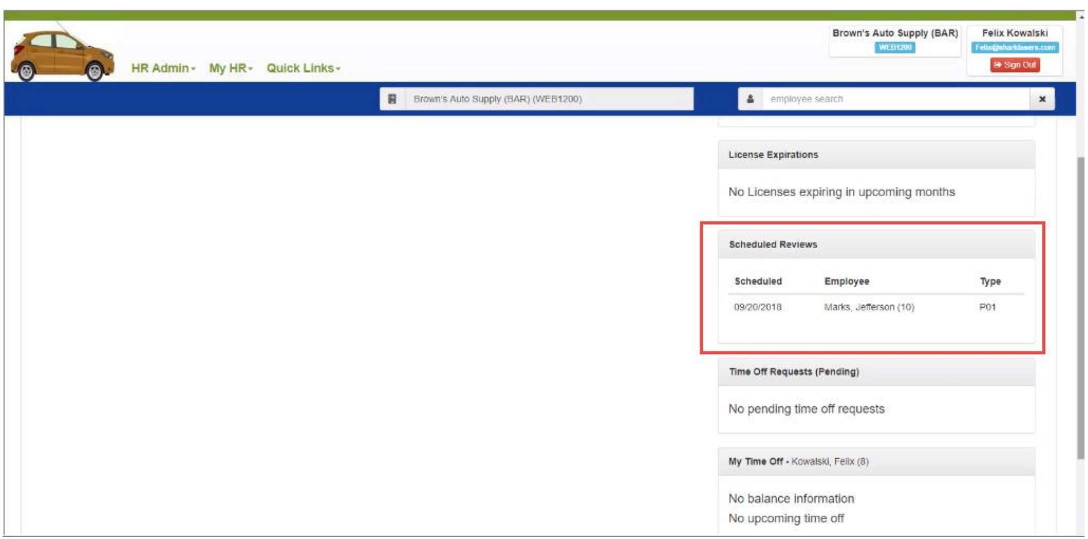
2. The system displays their **Reviews** dashboard.



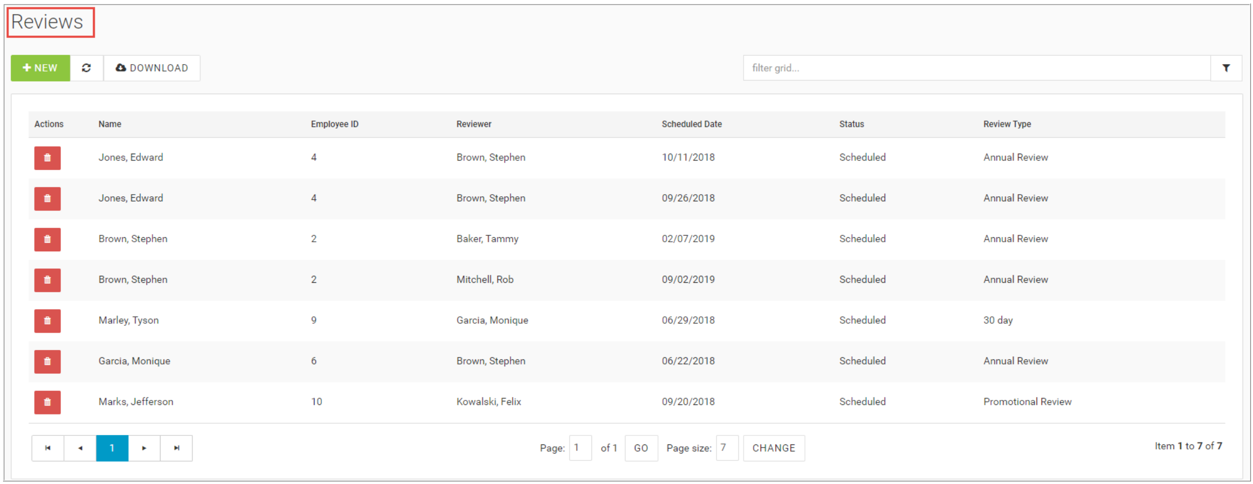
The employee's **Review** dashboard will display any of the employee's reviews: past, present, or future that are linked to this employee.

Manager/Reviewer View of the Review

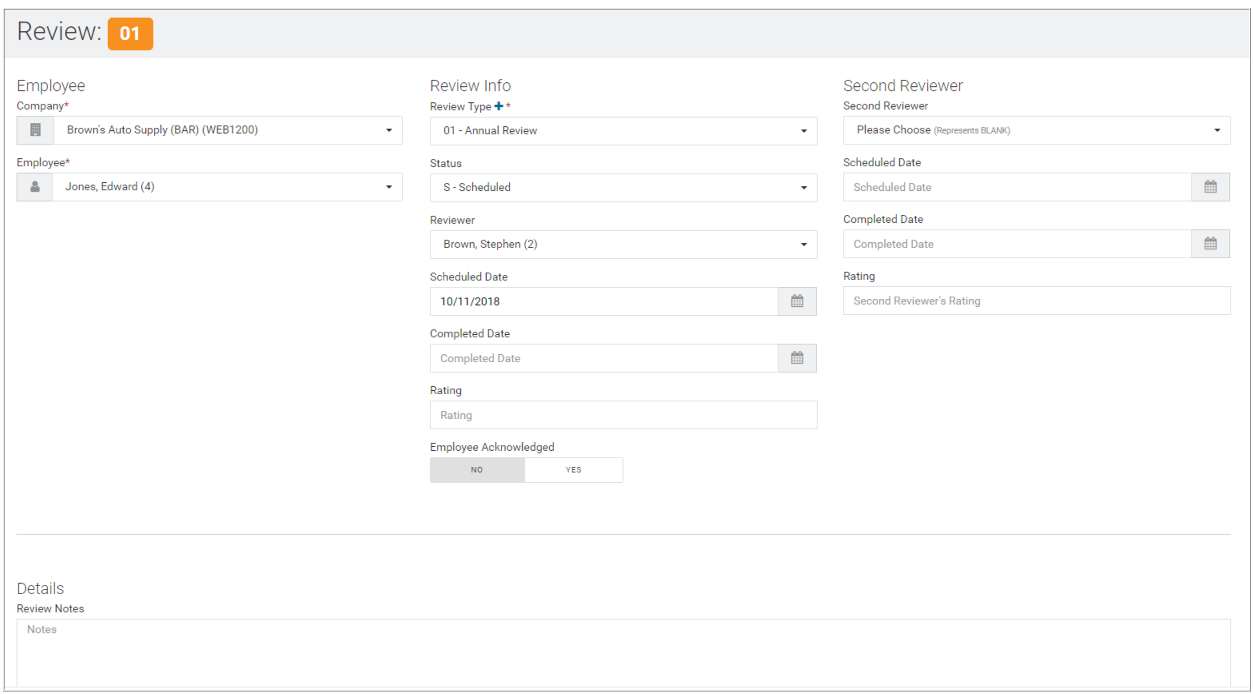
The Manager/Reviewer can see any of their scheduled reviews from their company **Dashboard**, in the **Scheduled Reviews** section.



Managers/Reviewers can also see their scheduled reviews by going to the **HR Admin – Employee Maintenance – Reviews** screen (or **Manager Service – Employee Maintenance – Reviews**).



The **Reviews** dashboard will list all their reviews and they can display additional details about the review.



Reporting on Reviews

Admins can get Standard Reports concerning Reviews and they can also create a custom review report.

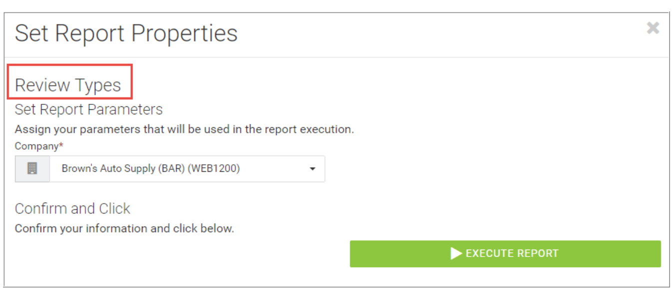
Reviews Standard Report

To run the Standard Review report:

1. Go to **HR Admin – Reporting – Standard Reports**.

2. The system displays the **Standard Reports** screen.
3. Scroll down to the **Review Types Report** row, as shown below.

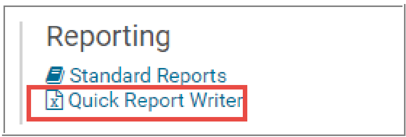
4. Click on the green Execute Report button on the **Review Types List Report** row.
5. The system displays the **Set Report Properties** screen.
6. Make sure the **Company** is selected, then click the **Execute Report** button at the bottom of the screen.
7. The system displays the **Review Types** report in a separate window, listing all of the Review Types that have been created.



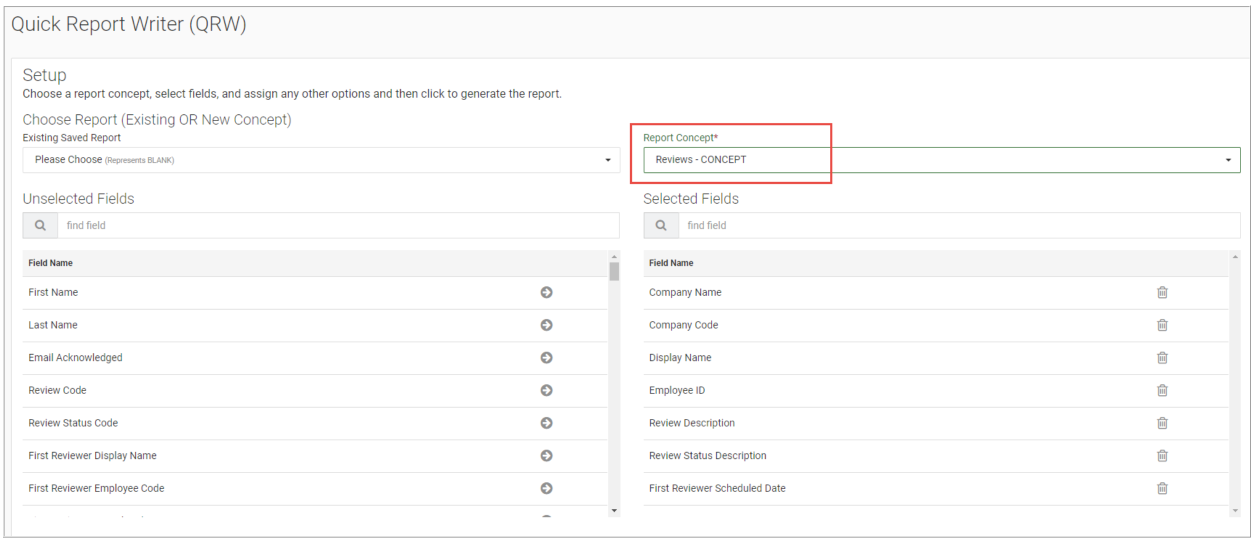
Creating a Custom Review Report

To create a custom Reviews report:

1. Go to **HR Admin – Reporting – Quick Report Writer (QRW)**.



2. The system displays the **Quick Report Writer (QRW)** screen.

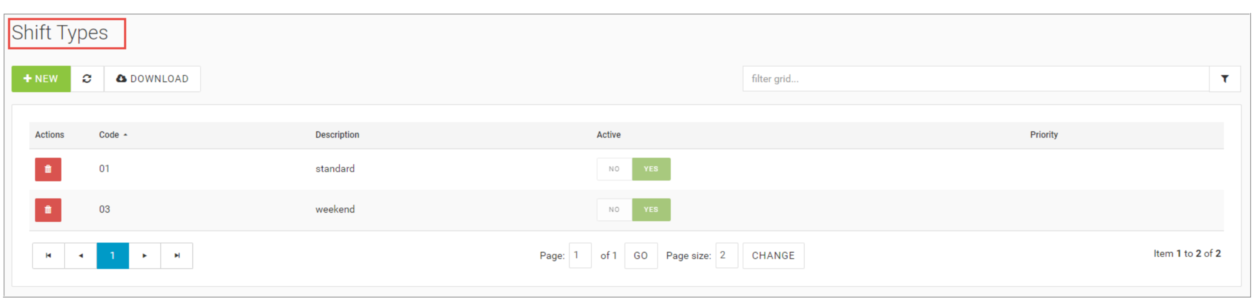


3. In the **Report Concept** dropdown, select the **Review Concept**. The system then displays a list of Review related fields you can select from in the **Selected Fields** section of the screen.

To learn more about creating custom reports, refer to the *Advanced HR 2.0 Reporting Guide*. This is available for download in the **Evolution Resource Center**.

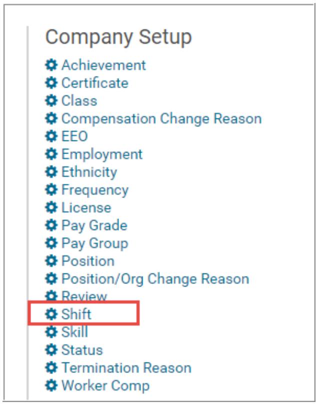
Shift Type

The Shift Types dashboard lists any Shift Types that have already been setup.



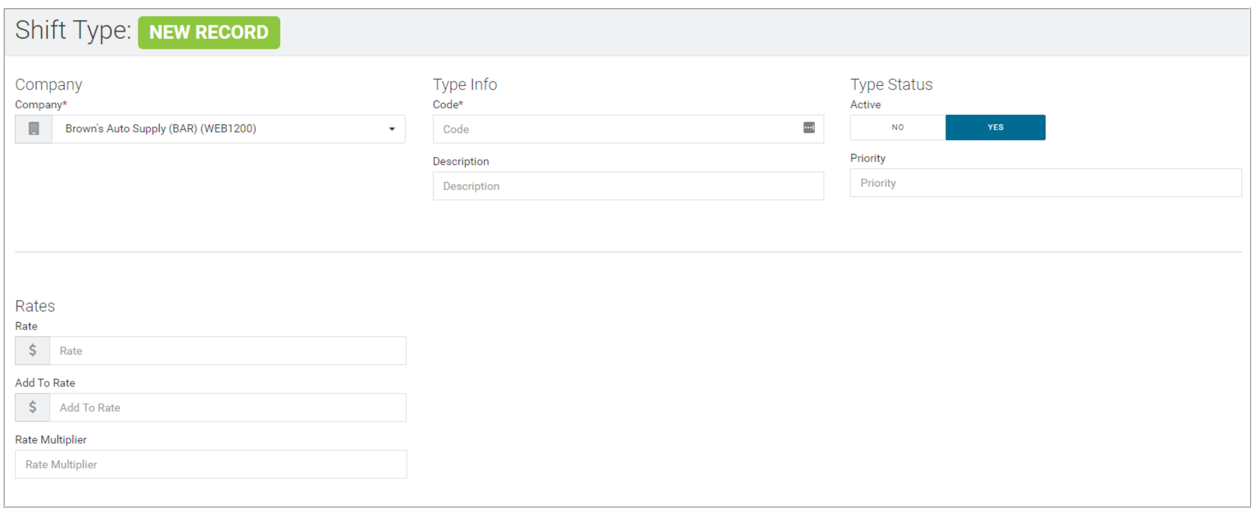
To set up a new Shift Type:

1. Go to **HR Admin – Company Setup – Shift**.



2. Click on the **+ New** button 

to add a Shift Type record. The system displays the **New Record** screen.



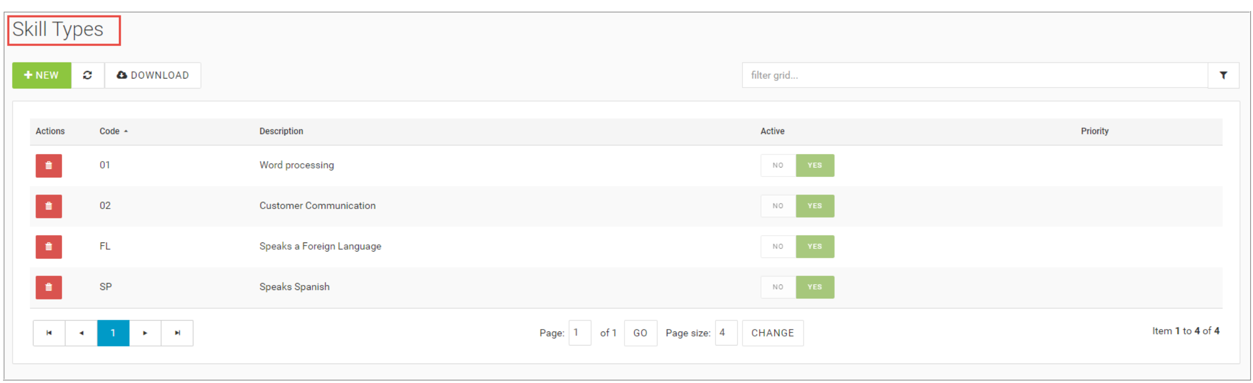
Complete the information on the **New Record** screen as described in the following table:

Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Enter a code for the Shift Type. This is a required field.
Description	Enter a description for the Shift Type.
Type Status section	
Active	Set the **Active Yes/No** toggle switch to **Active** to make this code active. To set the code to be inactive, set this to **No**.
Priority	This optional field is used to control the order of the values that display in the Shift Types dashboard. If left blank here, the values will be listed in alpha-numeric order.
Rates section	
Rate $	You can enter the dollar amount for this Shift Type rate.
Add to Rate $	You can enter an additional dollar amount to add for this Shift Type.
Rate Multiplier	You can enter a number as a rate multiplier for this Shift Type. For example, for this Shift Type the rate will be one and a half (1.5) times the standard rate.

3. Click the **Save Changes** button.

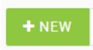
Skill Type

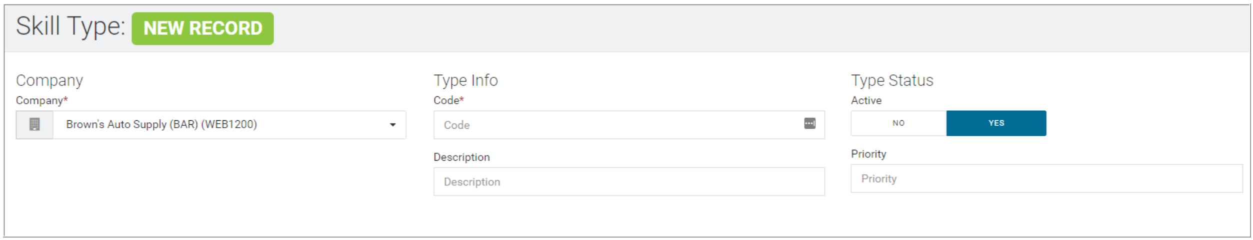
The Skill Types dashboard lists any existing skill types values.



To create a new Skill Type record:

1. Go to **HR Admin – Company Setup – Skill**.

2. Click the **+ New**  button.

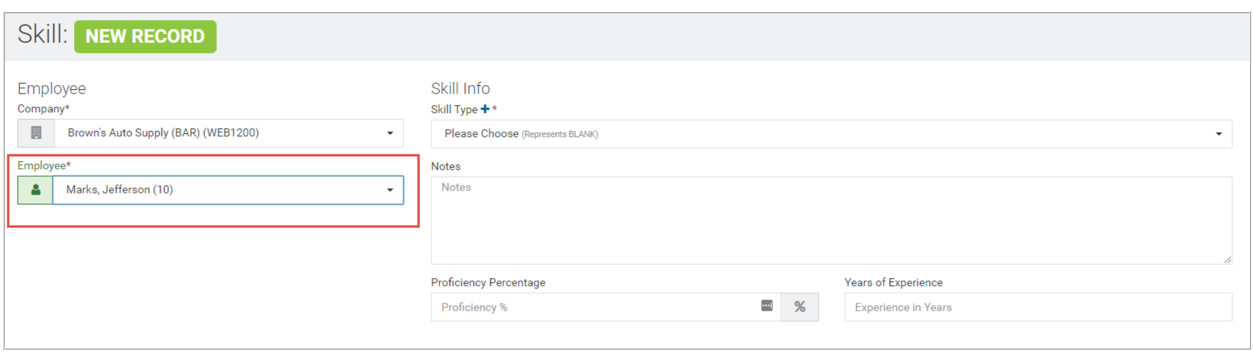


Complete the information on the **New Record** screen as described in the following table:

Field / Button	Description
Company section	
Company	Select the company if not already selected.
Type Info section	
Code	Enter a code for the Skill Type. This is a required field.
Description	Enter a description for the Skill Type.
Type Status section	
Active	Set the **Active Yes/No** toggle switch to **Active** to make this code active. To set the code to be inactive, set this to **No**.
Priority	This optional field is used to control the order of the values that display in the Skill Types dashboard. If left blank here, the values will be listed in alpha-numeric order.

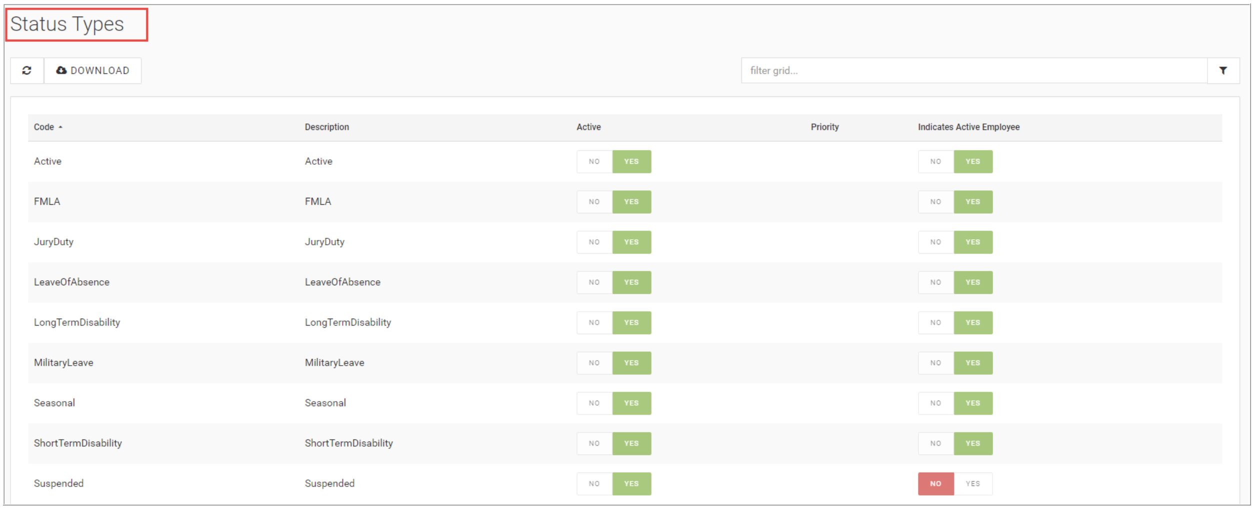
3. Click the **Save Changes** button.

To assign a skill type to an employee, go to the **HR Admin – Employee Maintenance – Skills** screen.



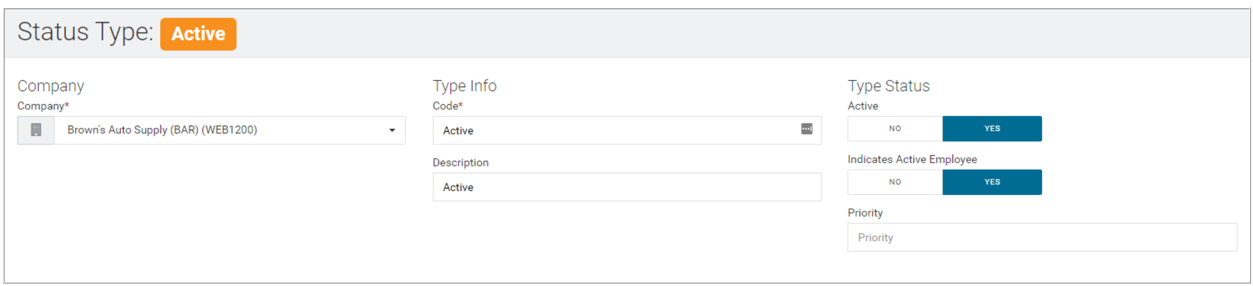
Status Type

Note that Status Types cannot be added/edited. These are system values. However, note that you can use the **Active Yes/No** toggles to make a specific status **Active** or not.



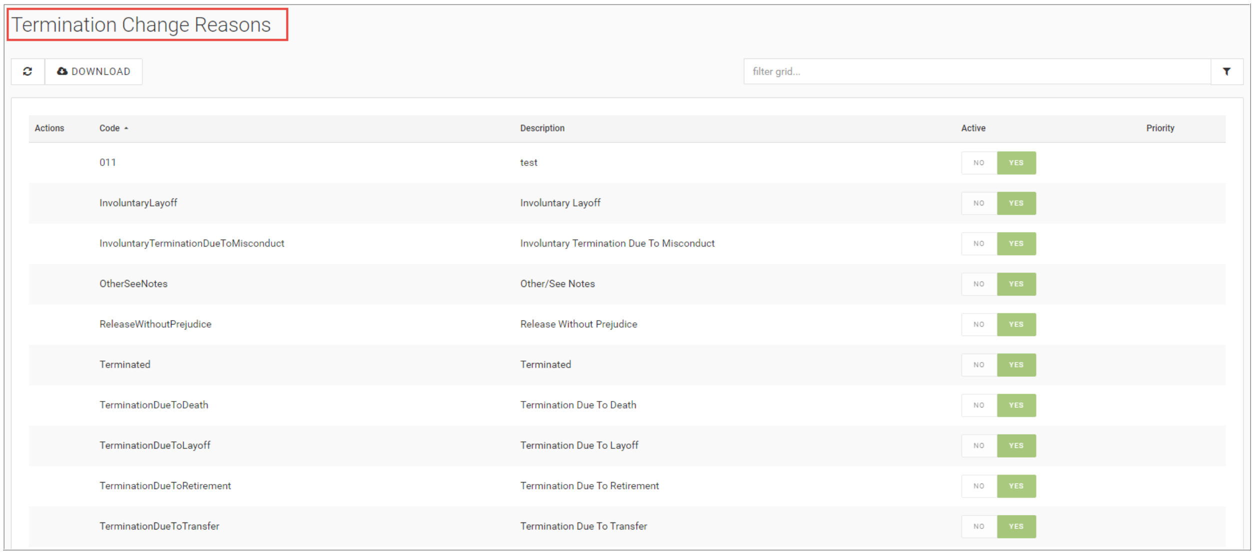
Code	Description	Active	Priority	Indicates Active Employee
Active	Active	NO YES		NO YES
FMLA	FMLA	NO YES		NO YES
JuryDuty	JuryDuty	NO YES		NO YES
LeaveOfAbsence	LeaveOfAbsence	NO YES		NO YES
LongTermDisability	LongTermDisability	NO YES		NO YES
MilitaryLeave	MilitaryLeave	NO YES		NO YES
Seasonal	Seasonal	NO YES		NO YES
ShortTermDisability	ShortTermDisability	NO YES		NO YES
Suspended	Suspended	NO YES		NO YES

Click on a row to see the details of a Status Type.



Termination Change Reasons

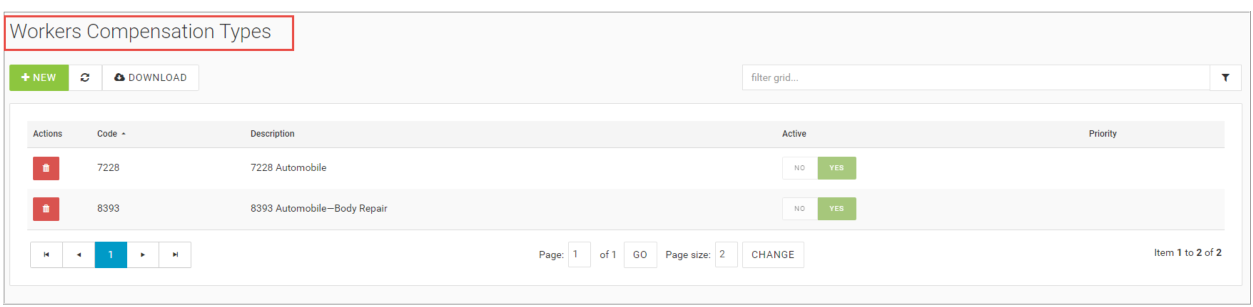
This screen lists the possible reasons for termination of an employee. These codes are used on the **Termination Wizard** screen when terminating an employee. Although you cannot add a new Termination Reason code, note that the Termination Reason codes that do appear in the **Termination Reason** dropdown on the Termination wizard can be set by the Admin on the **HR Admin - Company Setup - Termination Reason** screen, by setting the **Yes/No** toggles in the **Active** column.



Click on a row to see the details of a Termination Change Reason.

Workers Compensation

Workers Comp Type codes are used when classifying a worker as Workers Comp when the employee has been injured on the job.



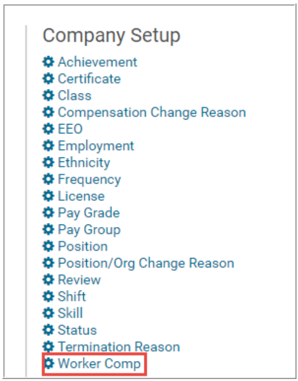
This section discusses the following topics:

- How to setup a Workers Comp Type
- Assigning a Workers Comp Type to an employee
- Workers Comp Type Reporting

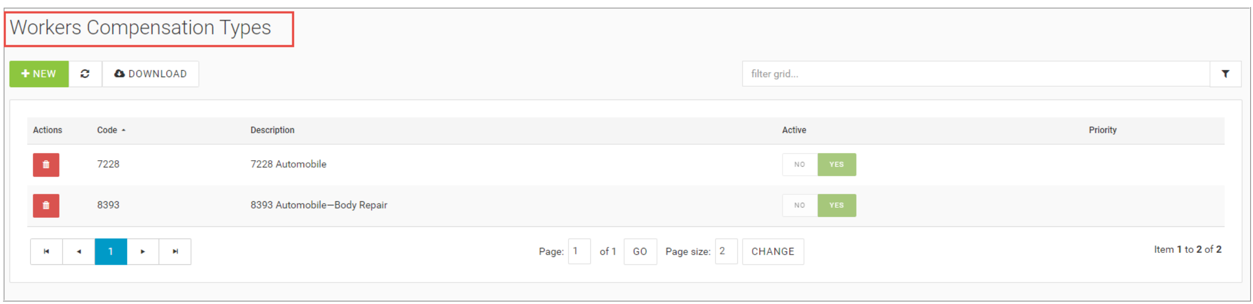
Setting Up a Workers Comp Type

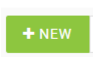
To set up a Workers Comp Type code:

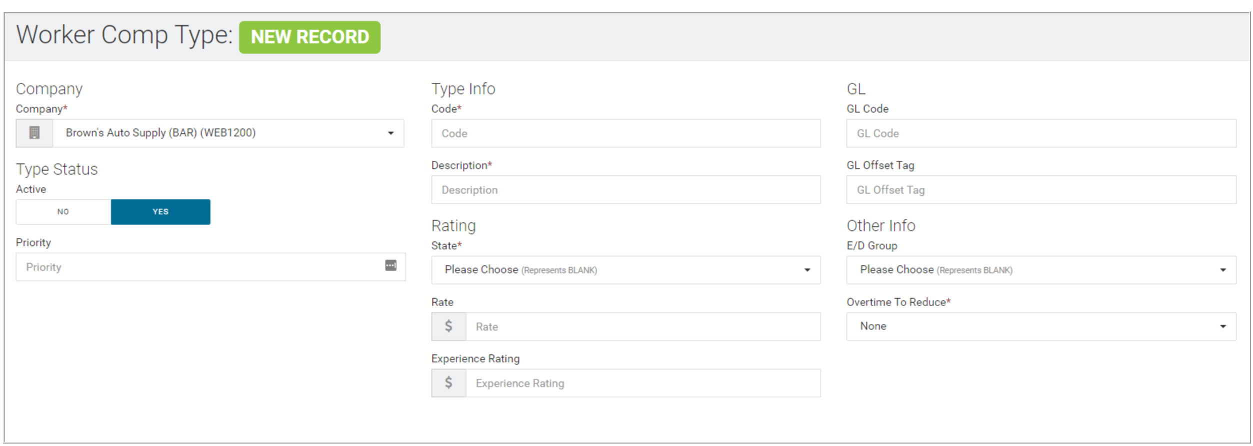
1. Go to **HR Admin – Company Setup – Worker Comp**.



2. The system displays the **Workers Compensation Types** screen, listing any existing Workers Comp Type codes.



3. Click on the **+ New** button  to add a new Worker's Compensation Type. The system displays the **Worker Comp Type New Record** screen. Select a **Company**, if not already selected.

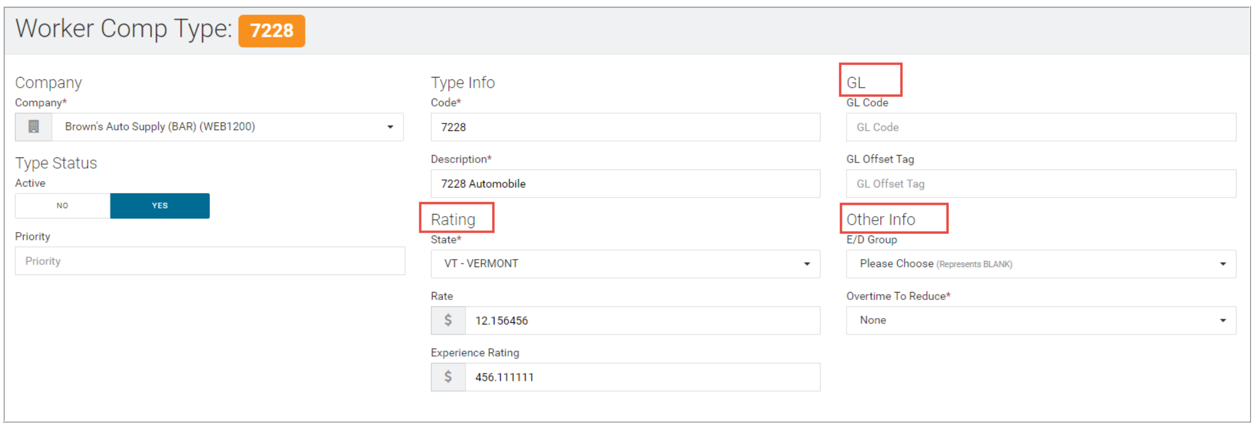


4. In the **Type Status** section, mark the Workers Comp Type as **Active** or Inactive using the **Yes/No** toggles.

5. The optional **Priority** is used if you want to assign the order of how the code appears in the dropdown later when assigning an employee a Workers Comp Type code. If the Priority is blank, the system will display the codes in alpha-numeric order.

6. In the **Type Info** section enter the Workers Comp Type **Code** and **Description**; these are both required fields.

7. Enter the remaining information if you have it in the **Rating**, **GL**, and **Other Info** sections of the screen. Note that the only required field in this section of the screen is the **Rating** – **State**.



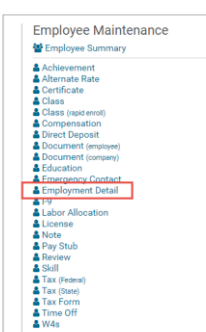
8. Click the **Save Changes** button .

Assigning a Workers Comp Type to an Employee

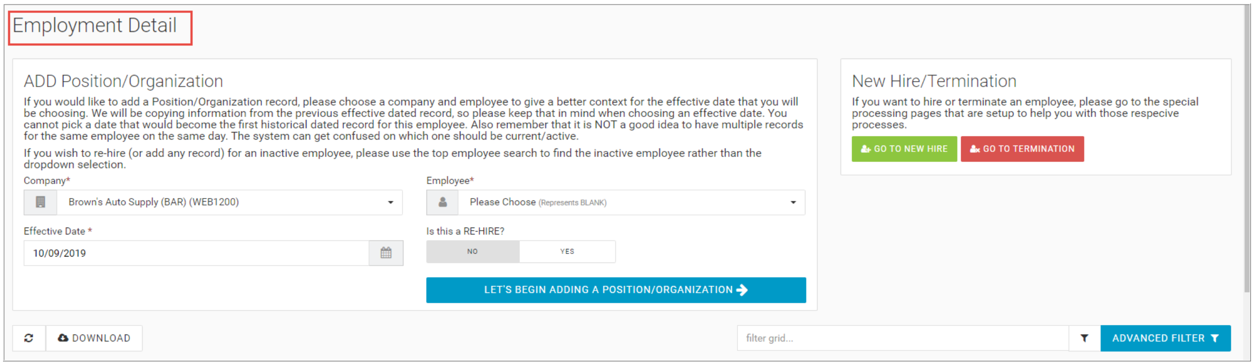
Once Workers Comp Types have been created and marked Active, they are available to assign to an employee, if required.

To assign a Worker's Comp Type to an employee:

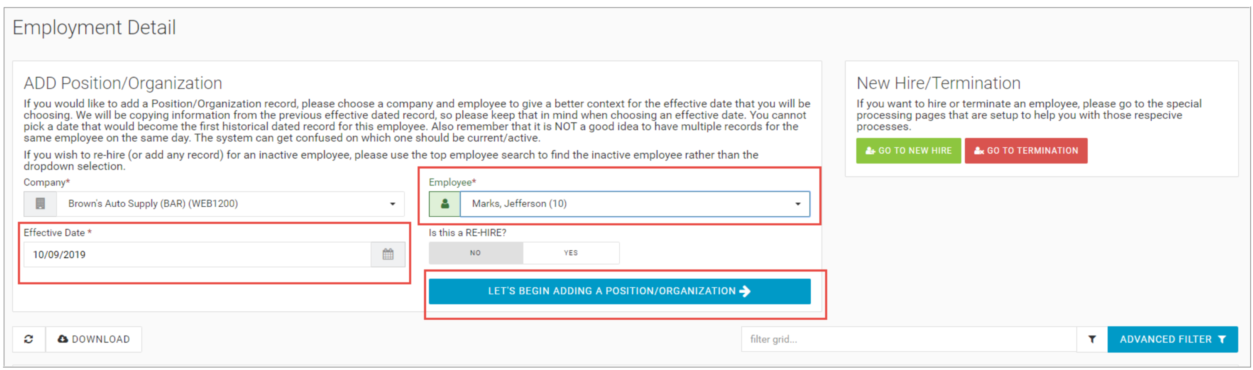
1. Go to **HR Admin – Employee Maintenance – Employment Detail**.



2. The system displays the **Employment Detail** screen.



3. When adding or updating Employee information, select the **Company** and **Employee** from the **Add Position / Organization** section of the screen.



4. Make sure you select the correct **Effective Date** for this update.
5. Click on the **Let's begin adding a Position / Organization** button.
6. The system displays the **Employee Detail** screen.
7. In the **Compliance** section of the screen, select the **Worker Comp Code** to assign to this employee from the dropdown.

Or, you can also create a new **Worker Comp Type Code** "on the fly" here by clicking on the blue Plus sign.

8. Click the **Save Changes** button.

Reporting on Workers Compensation Type Codes

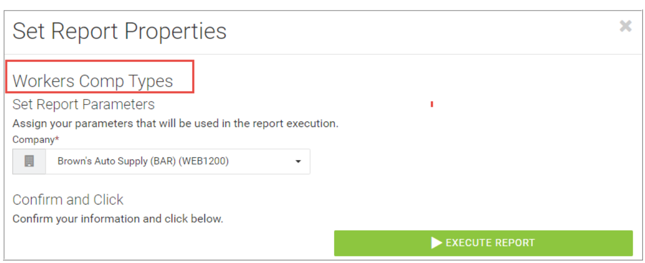
As you enter more Workers Compensation Type Codes, you can run a standard report at any time in order to keep track of them.

To run the Workers Compensation Type Report:

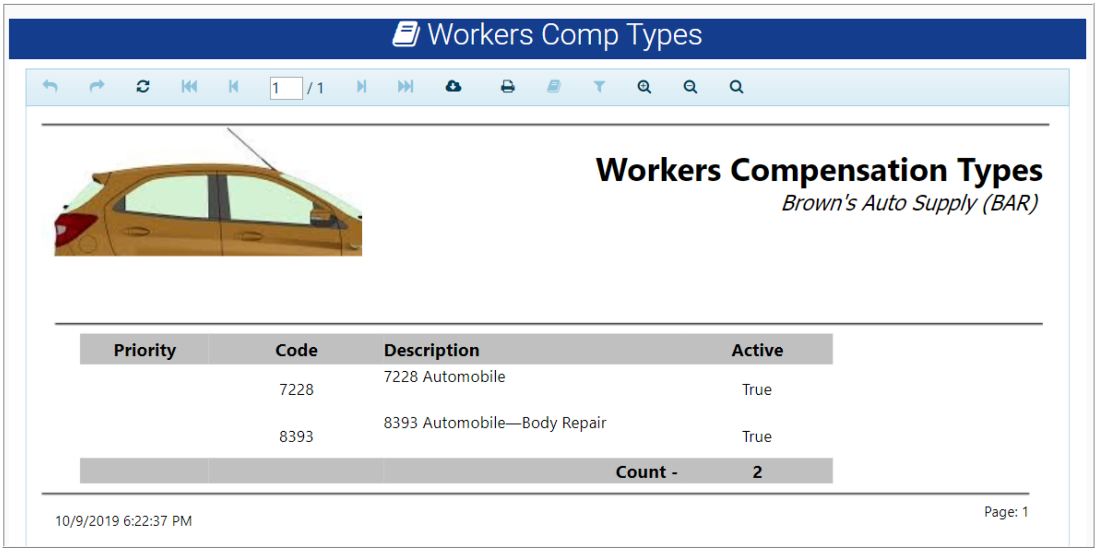
1. Go to **HR Admin – Reporting – Standard Reports**.

2. The system displays the **Standard Reports** screen.
3. Scroll down to the **Workers Compensation Types** report row.

4. Click on the green arrow Execute Report icon.
5. The system displays the **Set Report Properties** screen.



6. Make sure you have selected the **Company** and click the **Execute Report** button at the bottom of the screen.



The system displays the Worker's Compensation Types report.

Creating New Users in Advanced HR 2.0

In this section (and the next) we discuss the following employee-related topics:

- The **creating a new user manually** process (**Add New Hire**) using the HR Admin – Company – User List screen. See the section "*Adding a New Hire Manually*" below.
- The **self-service setup** process of adding a new user (Self-Service Setup) using the HR Admin – Employee Actions – Self-Service Setup. See the section "*Creating New Users with Self-Service Setup*" below.

Important: For users, who are already **existing client users in the Payroll** system, their Advanced HR 2.0 user accounts are **automatically created the first time they sign into Advanced HR** through the Evolution **Single Sign On** (SSO) Sign In screen. Note that you do not have to create an existing payroll client user as a new user in Advanced HR. You do, however, have to take additional steps to configure an existing payroll client user in order to be fully functional in Advanced HR. See the section below "*Additional Steps the Admin Needs to do to Configure the Payroll Client User*."

Each topic is described below.

Adding a New Hire Manually

An Admin or a Manager can enter a new hire manually. Use this process where a new hire is **not** asked to complete forms online and the Admin will complete all the required information for the employee.

Note: It is important to note that adding a new hire is a two-step process. The first step is to create the new hire by inputting their information (name, address, position, etc.). The second step is to create them as a user in the system. This is important because without being a user in the system, they will not be able to access their ESS or other Role-dependent functionality.

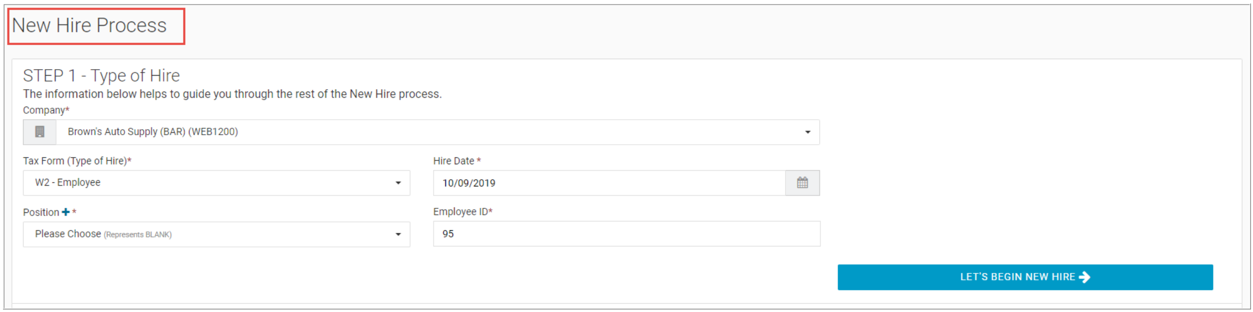
Adding a New Hire Process:

1. Create a new hire
2. Create the new hire as a user

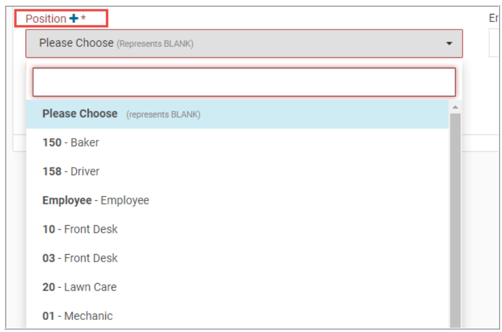
To add a new hire manually:

1. Navigate to **HR Admin – Employee Actions – Add New Hire**.

2. When the user selects the **Add New Hire** option, they are taken to the **New Hire Process** wizard. This wizard walks the user through the process of manually adding the employee. The New Hire Process wizard is similar to the Onboarding Prep workflow. If the user has not selected a company, they will be prompted to do so.



Add New Hire screen

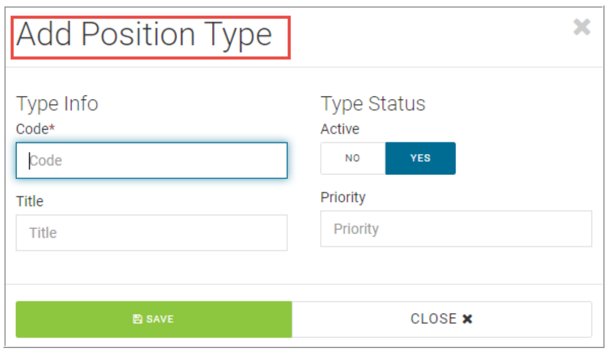


Note: Required fields in Advanced HR 2.0 are indicated with a red asterisk (*).

STEP 1 – Type of Hire

3. Complete the fields on the **Add New Hire** screen – **Step 1 – Type of Hire** section per the following table.

Field / Button	Description
Company *	Select the **Company**, if not already chosen.
Tax Form (Type of Hire) *	Select the Tax Form the employee will use depending on which employee type the new hire is. • **W2 – Employee** • **1099 – Contractor** The Tax Form may have been set to default to one value for this company.
Hire Date	Enter the date of hire or select the date using the calendar. The Hire Date can be the current date, a future date, or a past date.

Field / Button	Description
Position *	Select the Position the new hire will fill from the dropdown menu, for example **CSR – Customer Service Representative**. The list of Positions will vary by company.
	You can also add a new **Position** on the fly by clicking the **Blue Plus Sign** icon.  When the Blue Plus Sign is selected, a popup window displays to guide the user through creating a new position. You can enter a **Code**, **Title**, and select the **Status** for the new position.  If you add a Position Type on the fly above, click **Save** when complete. The new position will now be available. Administrators create Positions for a company using the **HR Admin – Company Setup – Position** screen.
Employee ID *	The system should fill in the **Employee ID** field automatically with the next available employee number for the company.
*** = Required Field**	

Note: Throughout Advanced HR 2.0, when a field is completed correctly, it changes from a red “X” to a green check mark.

4. Click the **Let’s begin New Hire** button at the bottom of the **Add New Hire** screen.

Result: The system redisplays the screen with a series of sections the user completes with the new hire information:

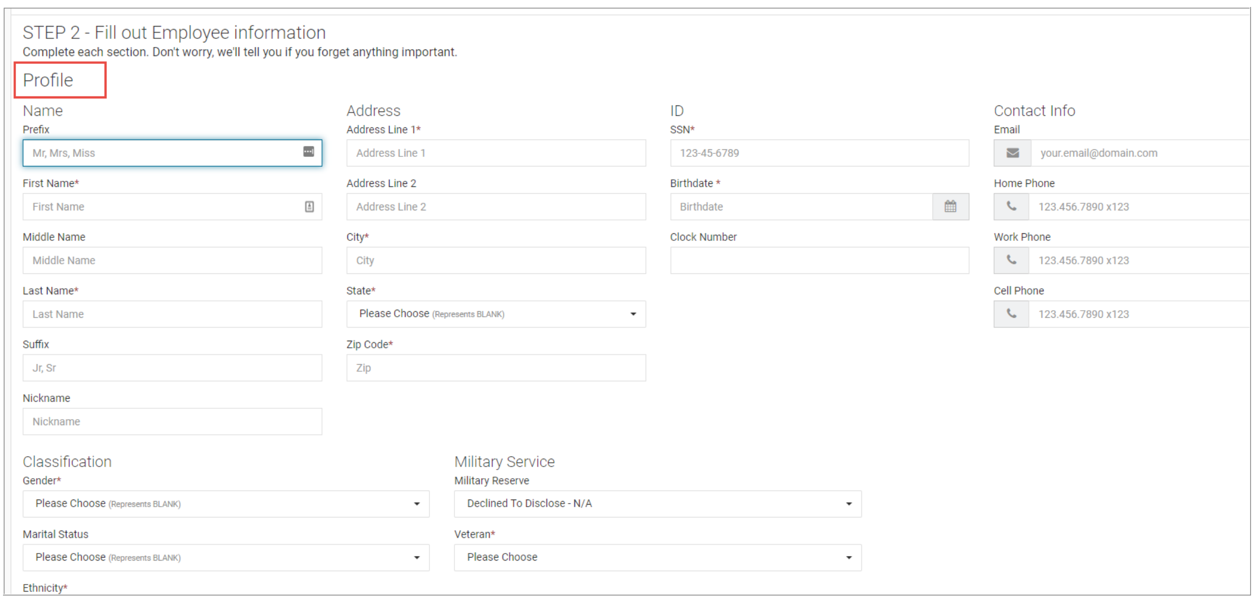
- Profile information (name, address, SSN…)
- Classification (gender, ethnicity, education…)
- Compensation (pay type, frequency, rate…)
- Payroll & Benefits information
- Employment information (position status, DBDT (ORG) level, reports to…)
- Emergency contact information
- User (used to link new hire to existing user)
    - By using the **Quick User Add** function
- User custom defined fields
- Integration

Each section is described below.

STEP 2: Fill out Employee Information

Profile section

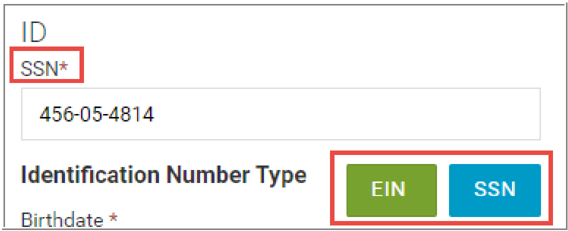
Enter the new hire's name, address, Social Security Number, birthdate, and email and phone contact information.



Note the required fields (marked with a red asterisk): **First** and **Last Name**, **Address Line 1**, **City**, **State**, **Zip Code**, **SSN**, and **Birthdate**.

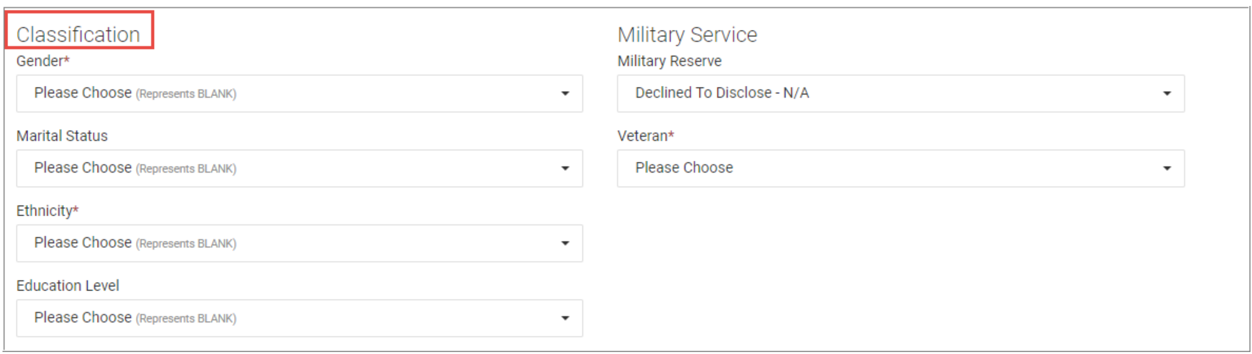
We have improved the system handling of 1099 Company/Employee Names and the **EIN/SSN** data collection during the add new hire process and during the onboarding process. This adds the ability to designate a 1099 Employee as either an SSN or EIN.

For example, when adding a new hire (**HR Admin – Employee Actions – Add New Hire**), in the **ID** section of the screen, the user can use the toggle switches to have the system correctly format either the ID field as an **SSN** field or as an **EIN** field:



Classification section

Enter the new hire's gender, ethnicity, and veteran status, if applicable.



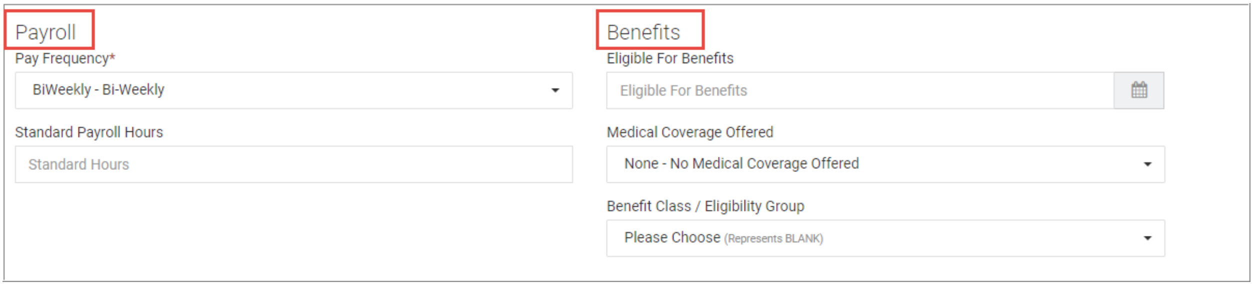
Compensation section

Enter the new hire's pay type and rate information.

Some of these fields may default in from the Company Setup.

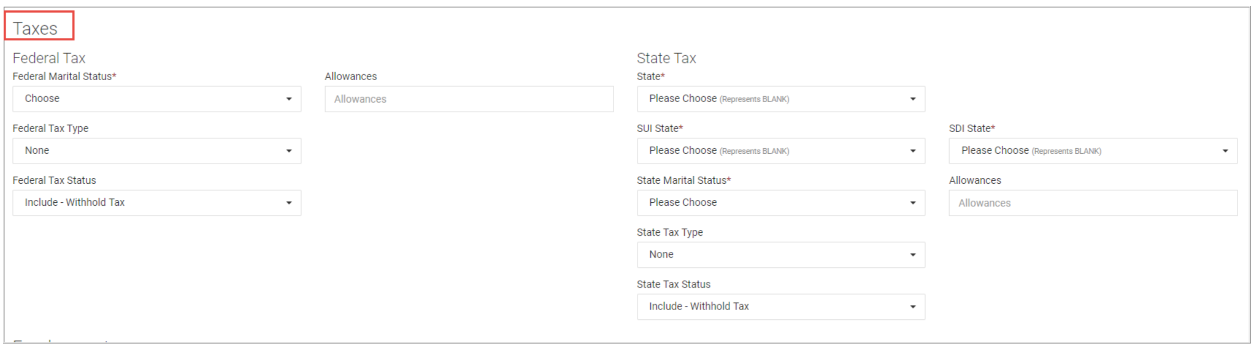
Payroll and **Benefits** sections

Complete the new hire's payroll and benefits information.



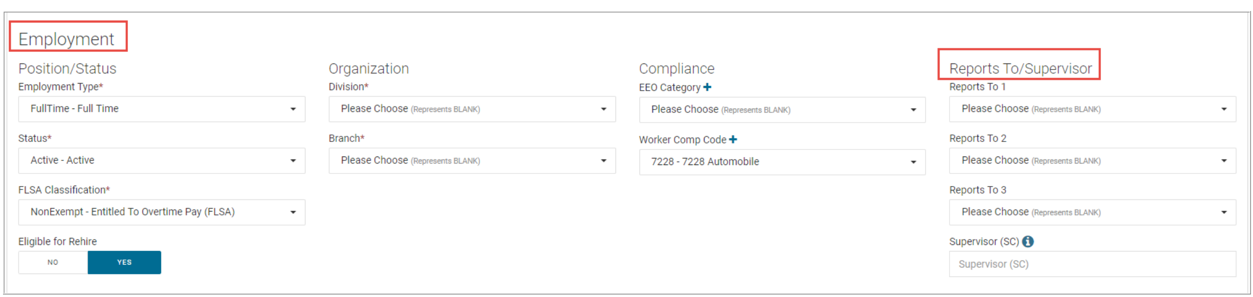
Taxes section

Enter the tax related information, **Federal** and **State**.



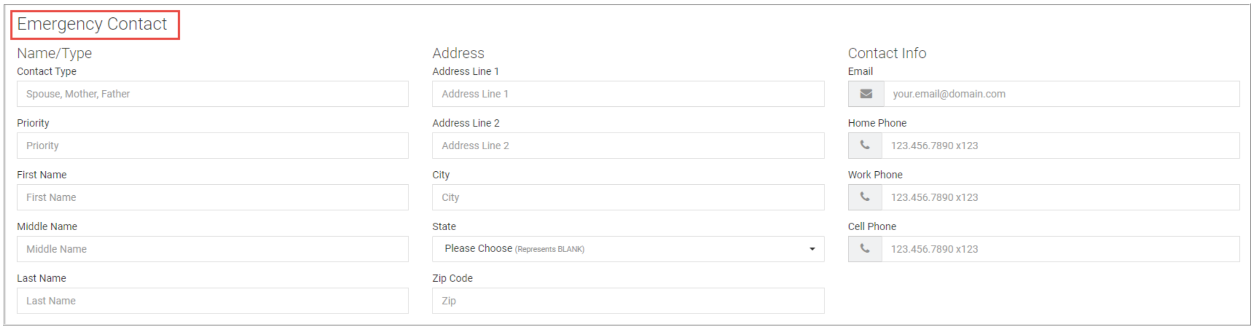
Employment section

Enter the new hire's employment information: position, DBDT information, compliance information and who the new hire reports to / supervisor.



Emergency Contact section

Complete the new hire's emergency contact information (contact type, name, address, email, and phone information).



User section

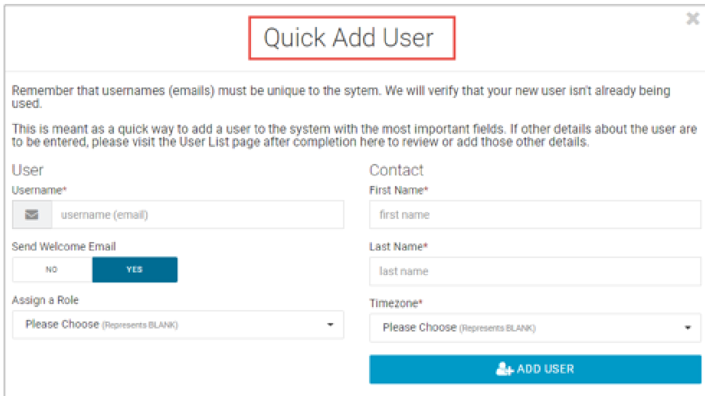
The **User** section is where you can link the new hire to an existing user. You are basically doing two tasks; you are adding a new hire and you are also making the new hire a user in the system.

- You can select an existing user in the **Select existing user** dropdown, if you have already created them.

- Or, and more commonly, *if the user does not already exist*, by using the **Quick Add User** function, you can quickly add a user and assign them a role for access to the system.

  Click the **Quick Add User** button, and the system displays the **Quick Add User** screen. Since, as mentioned above, you have to create a User in the system, this ability will save time. Clicking on the **Quick Add User** button, a pop up will open for you to enter a **Username** (email address), **Assign a Role** (security), enter **Contact info**, and a **Timezone**. You can even **Send a Welcome Email** from this pop up that will give instructions to the new hire on signing into their ESS, if appropriate to do so at this time. Click **Add User** when complete 

.

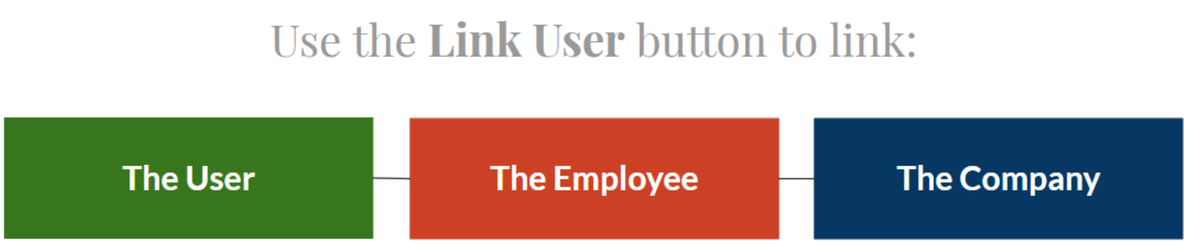


You can create a Username, edit contact info, and set a time zone.

In the **Assign a Role** dropdown, you'll see the Roles that are associated with this company. As with all user roles, this will allow the user a level of access to the system that is dependent on their function within the company.

In addition, you can **Send a Welcome Email**. The Welcome Email will instruct the new employee how to access Self-Serve Onboarding.

Click the blue **Add User** button when complete. You'll be taken back to the **Employee Summary** screen. Remember to click the green **Link User** button to link:



Note: Remember that usernames (emails) must be unique to the system. Advanced HR 2.0 will verify that the new username is not already being used. **Quick User Add** is meant as a quick way to add a user to the system with the most important fields. If other details about the user are to be entered, go to the **HR Admin - Company - User List** screen after completion to review or add other details.

User Defined/Custom section

This optional section is for creating any user defined fields.

Integration section

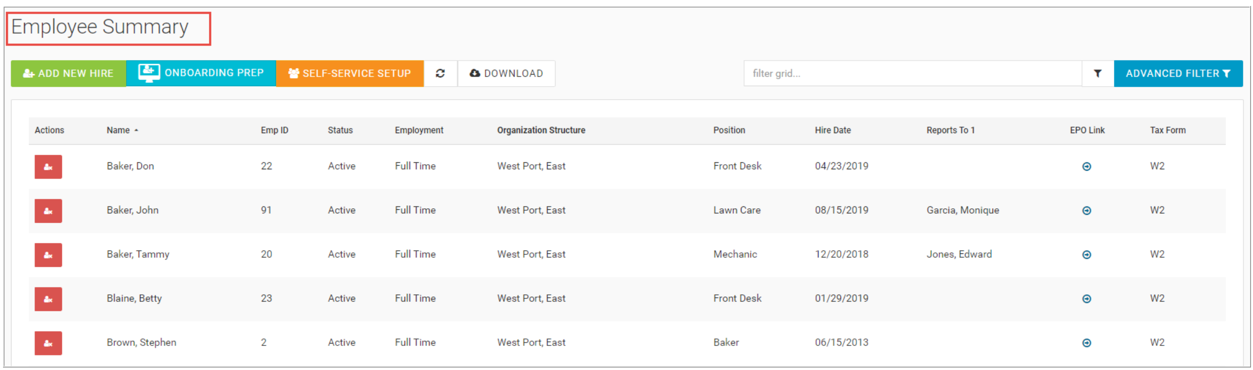
This section is used to integrate the new hire with other systems such as SwipeClock.

Save Options

When all the information has been entered on the **Add New Hire** wizard screen sections, the user has the following three options:

- **Submit New Hire** – submits the new hire information into the system
- **Submit New Hire and start another** – complete this new hire and start the add new hire wizard for a different employee
- **I did something wrong…let me start over** – cancels the information you entered so far and does not save the new hire

If the **Submit New Hire** button is clicked at the end of the Add New Hire wizard process, the user is taken to the **Employee Summary Dashboard**.



Employee Summary screen

The new hire is now an employee and ready to go.

From here, the user has the option to do a number of things:

- Review any employee information by clicking on their name
- Add another new hire
- Start the Self-Service Setup – invite the new hire to the employee self-serve functionality
- Start the OnBoarding process preparation
- The user can also Download the employee list into an Excel spreadsheet
- Start the termination process by clicking on the red icon under **Actions**

If you used the **Quick Add** button, you may want to add additional details about the user later or just to review the details. If so, go to the **Company – User List** screen.

To learn how to Terminate an employee, see the section in this guide Terminating an Employee.

Creating New Users with Self-Service Setup

Self-Service Setup is an **HR Admin – Employee Actions** menu option that allows for multiple employees to be given access to Employee Self-Service en-masse (in mass) or batches. This will create users for all selected employees and attach the user to the Employee Record. The Self-Service Setup process is described below.

It's important to note that **Self-Service Setup** is different than **Onboarding Prep** (sometimes also referred to as Self-Service Onboarding), which is the process where an Admin will start and the new hire will then complete the onboarding process themselves online. The terminology of these two items can be confusing. The Onboarding Prep process is discussed in the next section of this guide.

Note: When a company is cutover, the employees' information will be migrated to Advanced HR 2.0 from Evolution Classic. However, the employees will still need to be created as users in the system. If an employee is not also a user, they won't be able to access their company's Dashboard. Self-Service Setup allows you to setup employees en-masse for user creation. You can choose one employee or multiple employees.

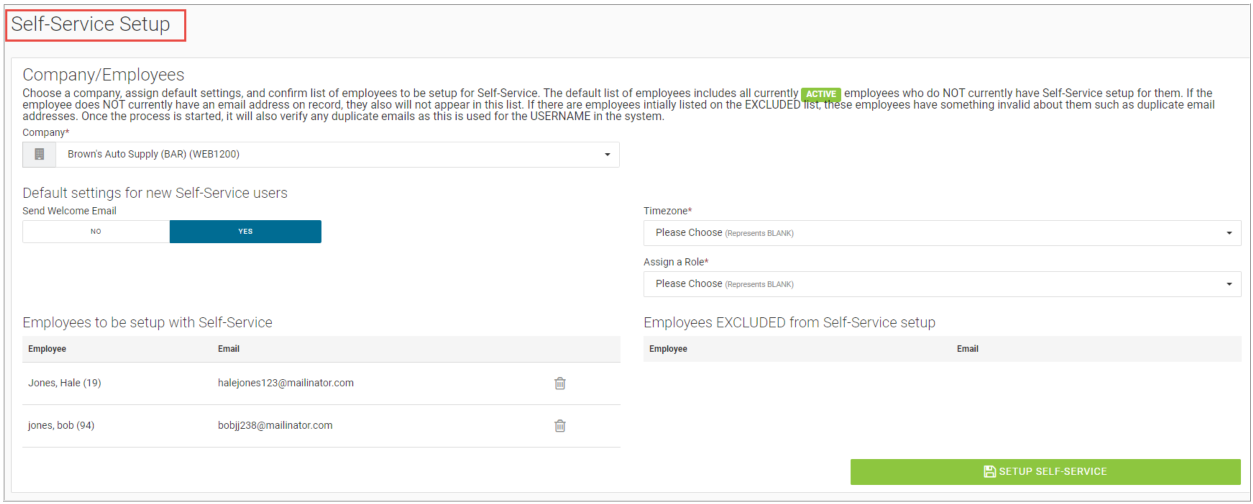
Advanced HR 2.0 will keep track of employees that have been onboarded, but have not yet been invited to Employee Self-Service functionality.

Using **Self-Service Setup**, you can invite any number of employees (one or multiple) to sign-in and access their Employee Self–Service Portal.

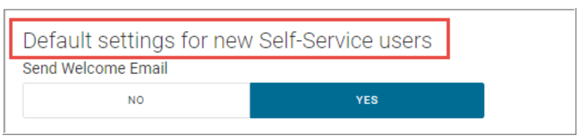
1. Go to **HR Admin – Employee Actions – Self-Service Setup**:

2. The system displays the **Self-Service Setup Dashboard**.

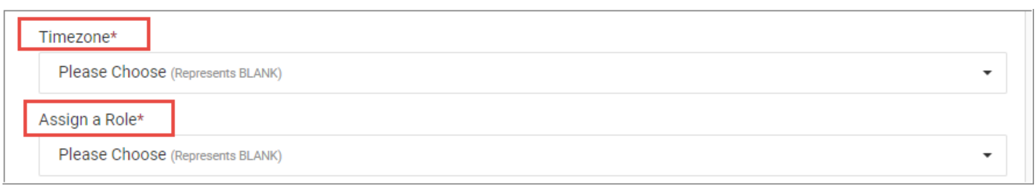
   Use the **Self-Service Setup** screen to choose a company, assign default settings, and confirm the list of employees to be setup for Self-Service. The default list of employees includes all currently Active employees who do not have Self-Service setup for them. If the employee does not currently have an email address on record, they also will not appear in this list. If there are employees initially listed on the **Excluded** list, these employees have something invalid about them such as duplicate email addresses. Once the process is started, it will also verify any duplicate emails as this is used for the Username in the system.



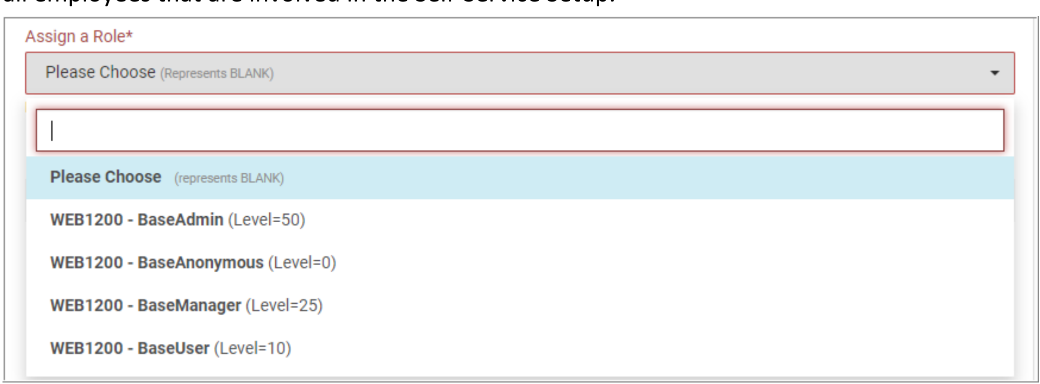
3. Select a **Company** (if one is not already selected) that you want to perform the Self-Service Setup for.
4. In the **Default settings for new Self Service users** section of the screen, you can use the **Yes/No** toggles to have a **Send Welcome Email**. If you set this to **Yes**, an email will be sent to each employee with instructions on how to sign into Advanced HR 2.0 and set their password.



5. Select the Company's **Timezone.**

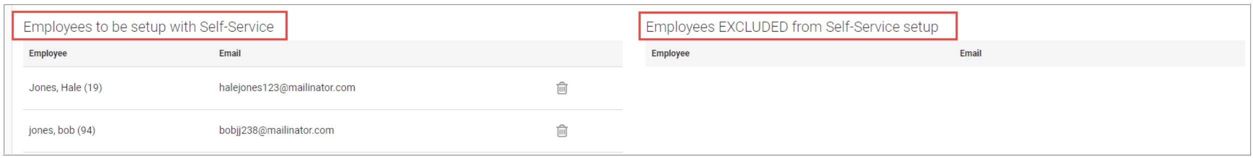


6. You can **Assign a Role** to the employee(s). Select a Role from the dropdown and that Role will be assigned to all employees that are involved in the Self-Service Setup.



Important: Best Practice is to initially assign a **Base User** level role to everyone. After the employee has completed their self-service setup, an Admin user can then assign any additional roles that may be required for that specific person.

7. The next step is to **designate the employees to be setup with Self-Service**. You can edit the list of employees.

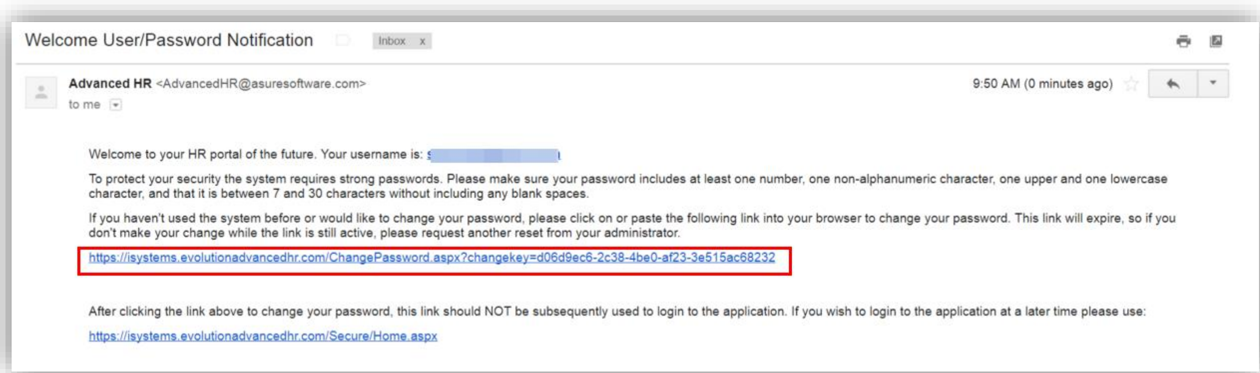


The default list of employees (**Employees to be setup with Self-Service** section shown on the left side of the screen) includes all Active employees who do not currently have Self-Service setup for them. If the employee does not currently have an email address on record, they will not appear in this list.

To exclude an employee, in the **Employees to be setup with Self-Service** section on the left side of the screen, use the Trash Can icon to the right of their name. When you click on the Trash Can icon, their name is moved from the left side of the screen to the **Employees EXCLUDED from Self-Service setup** section on the right side of the screen. For example, in the above, you can see that Bruce Banner has been excluded from the self-service setup.

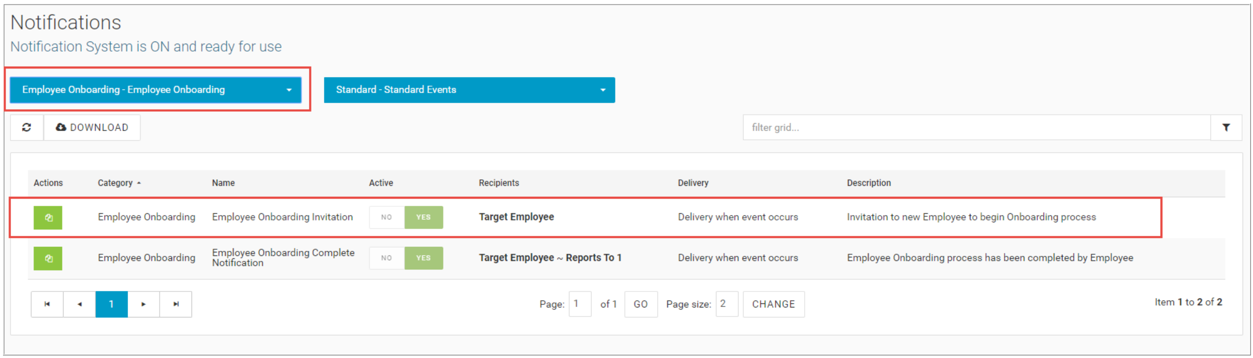
8. Once everything is complete, click the **Setup Self-Service** button at the bottom of the screen.

9. The **Welcome Email** is sent to all the employees that were designated for Self-Service Setup, which provides them with instructions on how to sign in and access their Advanced HR 2.0 Employee Self Service Portal.

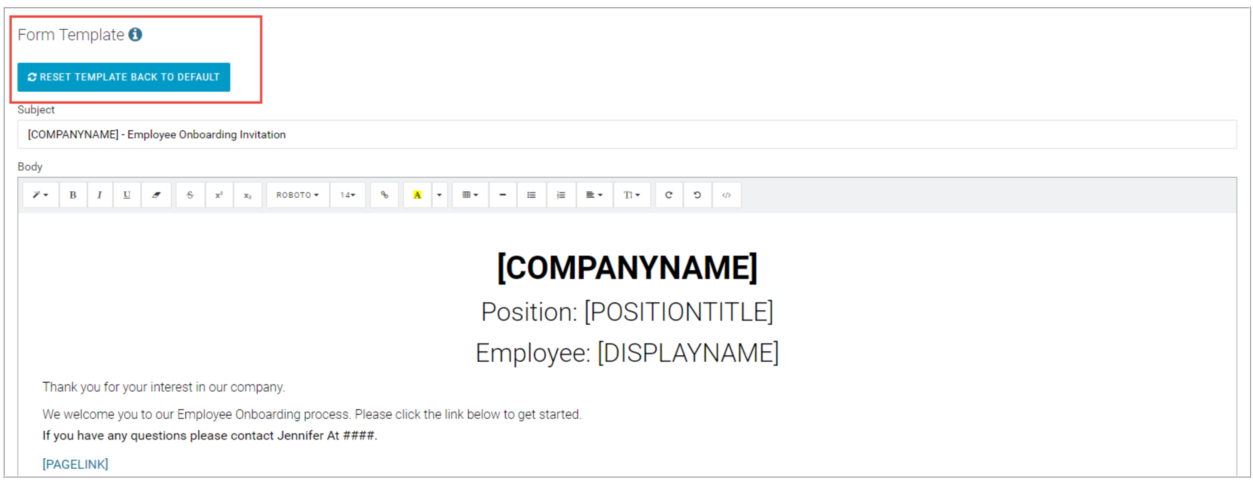


Note: The email link on the Welcome Email sent to the employee will expire in 24 hours.

Contained within the Welcome email are instructions for the employee to sign into the system and set their password. The wording of this Notification can be edited in **HR Admin – Communication – Notifications**.



Click on the Employee Onboarding Invitation notification row.



Notification functionality is reviewed earlier in this guide.

Onboarding Prep Process

The **Onboarding Prep process** (also referred to – perhaps confusingly – as *Self Service Onboarding*) is the process where the Admin will start and the new hire will then complete the onboarding process themselves online. The bullet points below summarize the difference between the two methods:

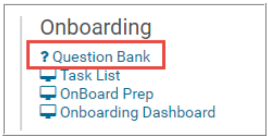
- By going to **HR Admin - Employee Actions - Self Service Setup**, the user can send a mass welcome email, with self-service instructions to *all new hires* that have not gone through onboarding yet. This task was described previously in the Self-Service Setup Process section.
- By going to **HR Admin – Onboarding - Onboard Prep**, the user can enter basic information for the new hire and send them a welcome email. This email will have a link and instructions for them to then complete the new hire information themselves online. See the next section of this guide: Using Onboarding Prep to Start Self-Service Onboarding.

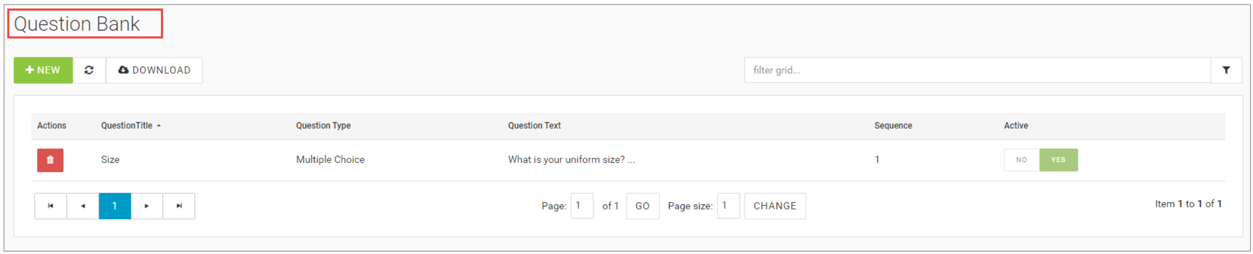
Once the welcome email is sent, the user can keep track of new hires through the **Onboarding Dashboard**. Let's first discuss how you can use the Onboarding Question Bank and Task List to impact the Onboarding Prep process itself, which we describe in the following section.

Onboarding Question Bank

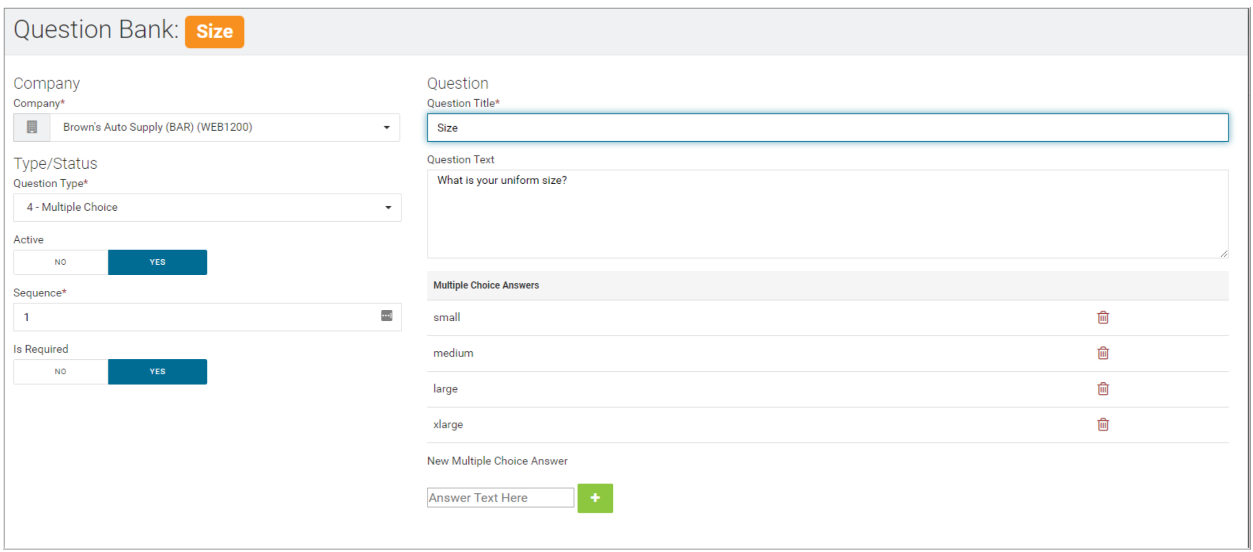
Custom questions can be added to the new hire onboarding process. Questions can be Yes/No, Free Form Text, Data, and Multiple Choice answers. Questions can also be used across multiple job postings.

Go to **HR Admin – Onboarding – Question Bank** to setup any questions that you want to ask the new hire.



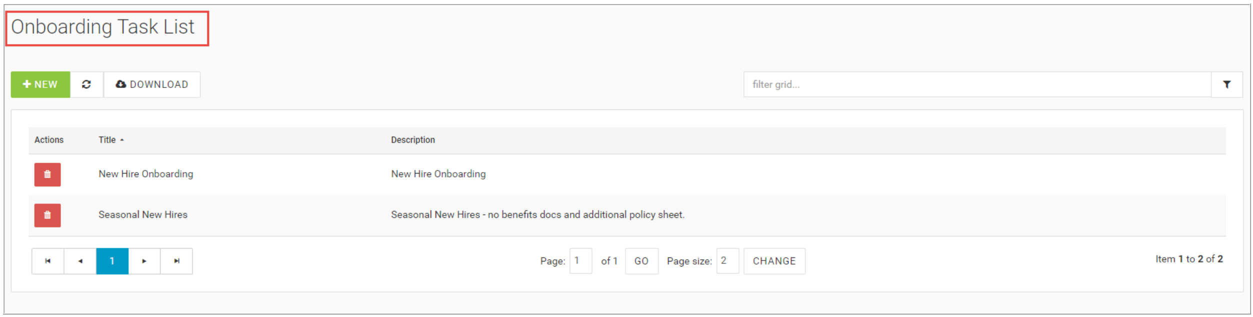


Click on a question row to see the Detail screen for that question.



Onboarding Task List

This is where you set up unique Onboarding experiences by position and view or edit the requirements for soon to be onboarded new employees.



The **HR Admin – Onboarding – Task List** screen displays any onboarding tasks that have already been created.

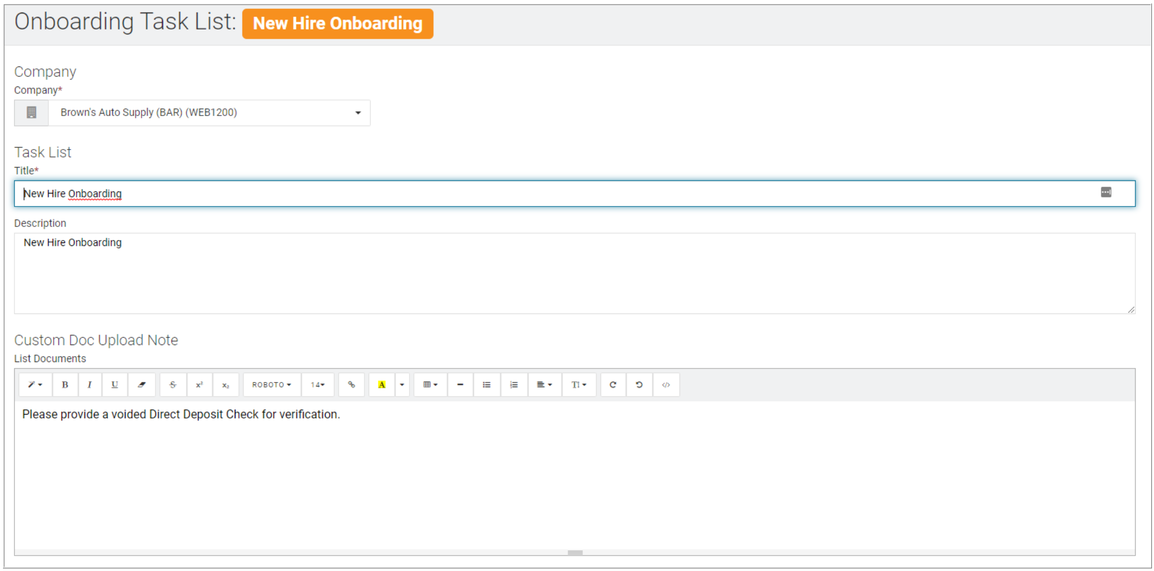
You also have the option to:

- View or edit a particular onboarding task by clicking on it
- Delete an onboarding task
- Create a new onboarding task

Onboarding Tasks can include:

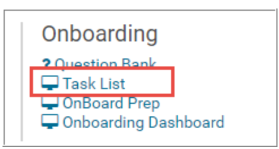
- Welcome notes
- Direct Deposit entry
- Electronic W-4 and I-9 entry forms with e-signature
- Custom questions that are specific to the Onboarding Task
- End notes
- A Background Check Authorization
- Company Documents (uploading of PDF's)

  Company Documents are uploaded using the **HR Admin – Company – Company Documents** screen. Once uploaded, you can bring them in the **Onboarding – Task List** screen to be included in the Onboarding task.

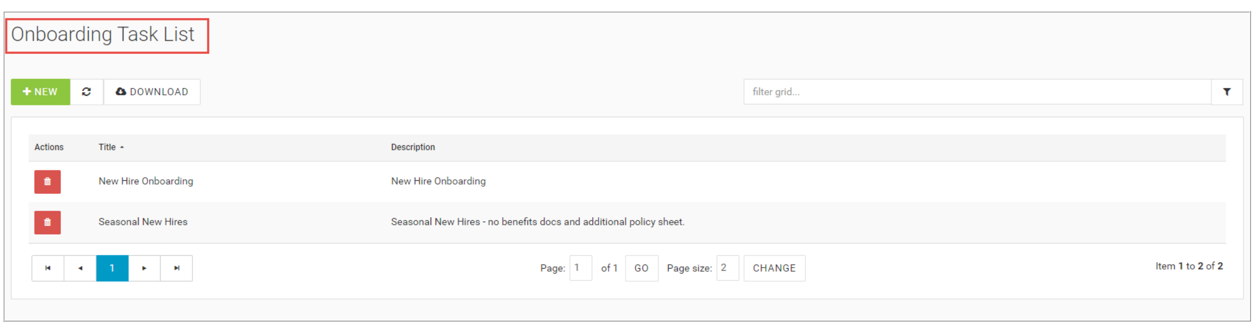


When setting up an Onboarding Task you have the ability to select a number of company tasks and documents to be used for onboarding.

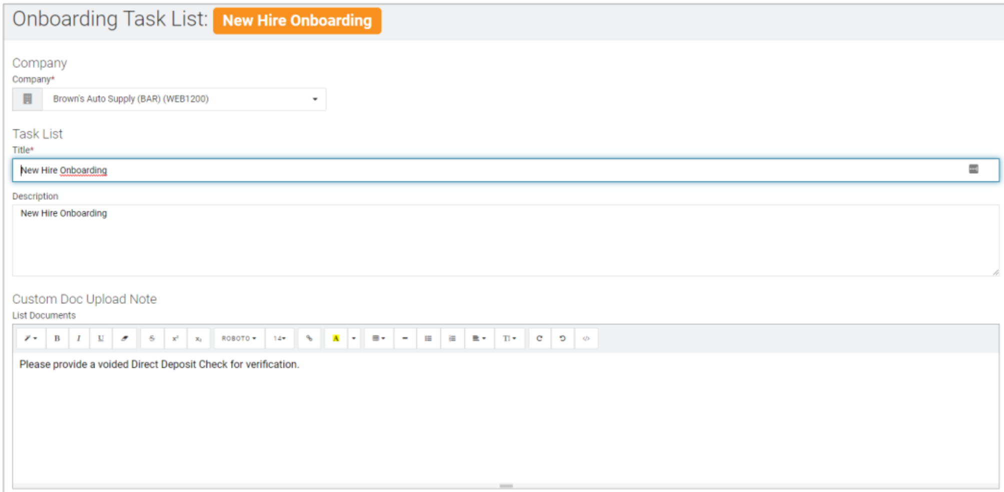
1. Go to **HR Admin – Onboarding – Task List**.

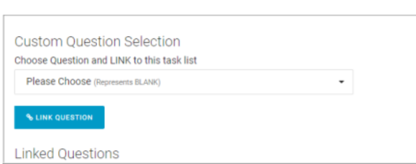


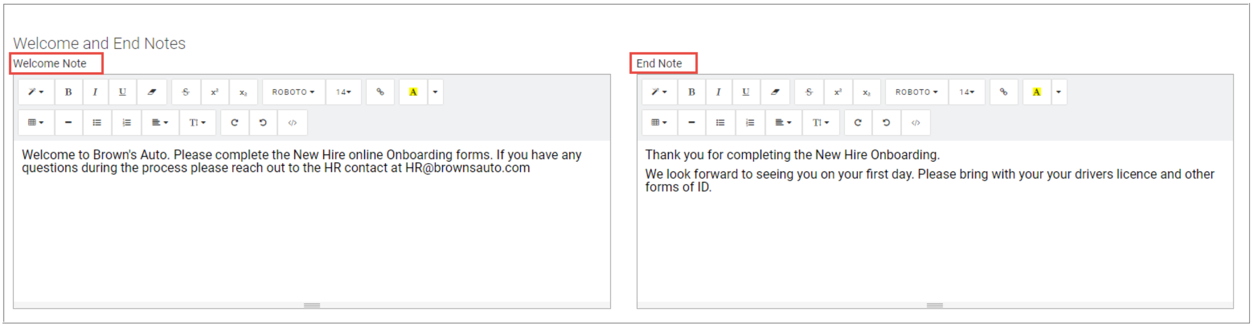
2. Tasks that have already been created are listed on the **Task List** summary screen. Click on a task to edit it.



To create a new Onboarding Task, click on the green **+ New** button + NEW on the summary screen. This displays the **Onboarding Task List** dialog box where you can create a new onboarding task.



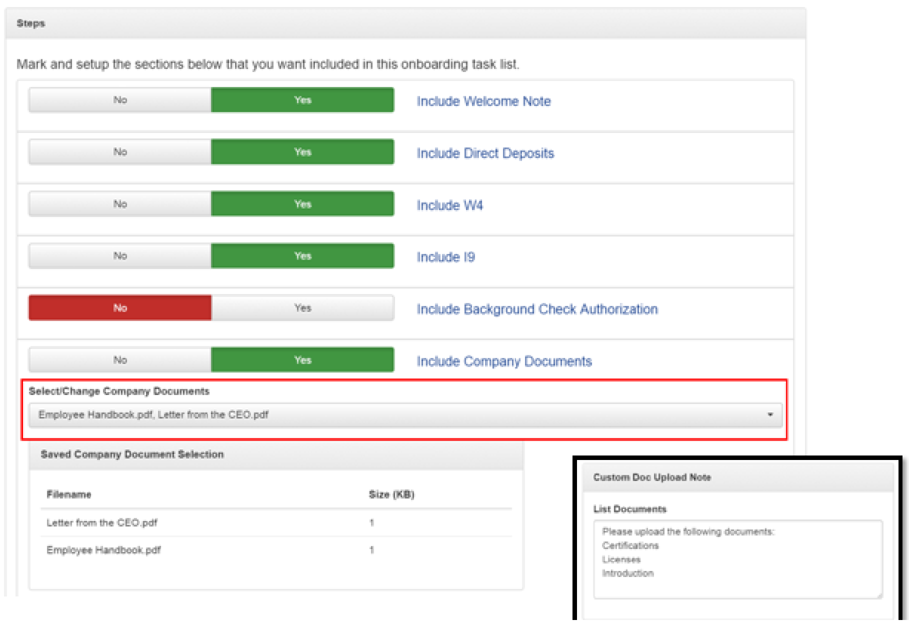




3. Select the **Company**, give the task a **Title** and optionally, a **Description**.
4. When setting up an onboarding experience you can select any number of company tasks and documents to be used for the onboarding process. Note our example below shows how the documents will be presented to the employee for download, review, and e-signature, except the Background Check Authorization.

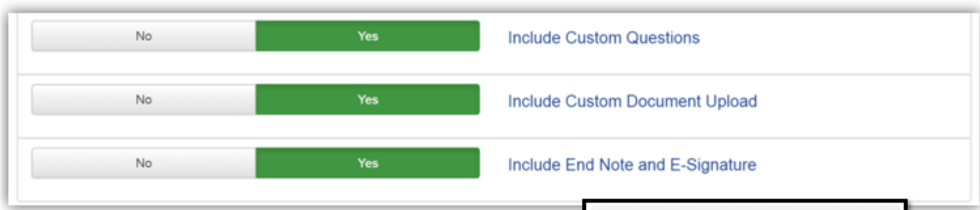
You can also create the **Steps** to be included.

Remember to **List the Documents** you'd like the new hire to upload.



All documents will be saved in the **Employee Documents Folder** along with the date, time, and name used for e-signature.

Remember, Onboarding Tasks can be general for all new hires or designed specifically for a particular position.



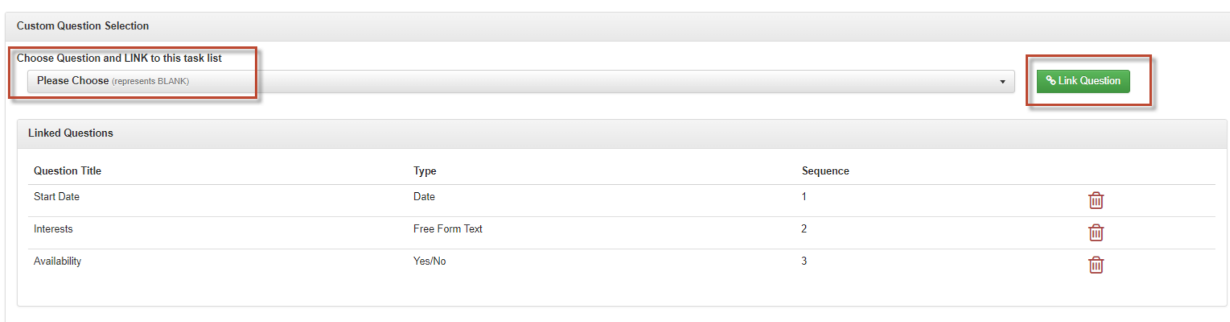
Using the **No/Yes** toggles, you can also include:

- Custom Questions
- Custom Documents
- End Note
- E-Signature

To add Custom Questions, go to **HR Admin - Onboarding Question Bank**.

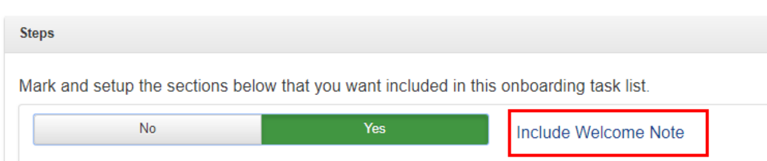
Custom Questions allows the new hire to answer specific questions during their self-service onboarding. Questions such as:

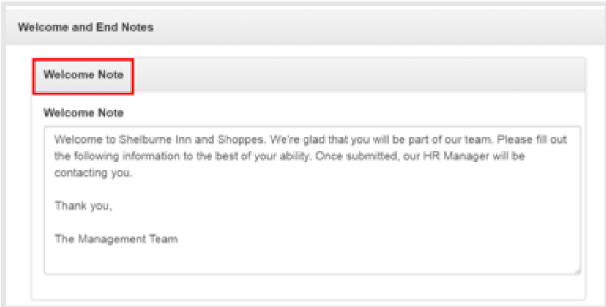
- Availability
- Special interests
- Needs for success



Welcome Note and End Note

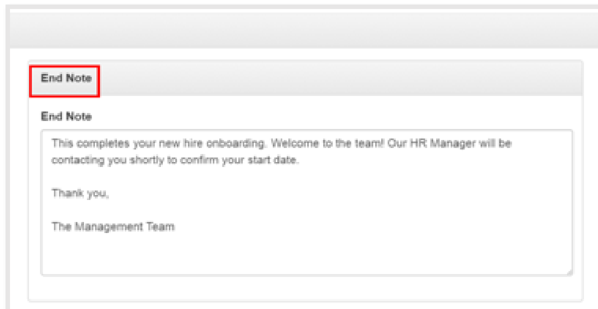
For the Welcome Note email to be sent to new hires, make sure that in the **Steps** section of the **Onboarding Task List** screen, the **Include Welcome Note** Yes/No toggle is set to **Yes**.





The **Welcome Note** is the first thing the new hire will see when they logon to complete their self-service onboarding.

The **End Note** is displayed after the new hire has submitted their information.



5. When you are satisfied with your Task List, click **Save Changes** to save the Onboarding Task List. It can now be used for Self Service Onboarding.

Once the Onboarding Task has been created, it can be used when you prepare (prep) an employee for Self Service Onboarding.

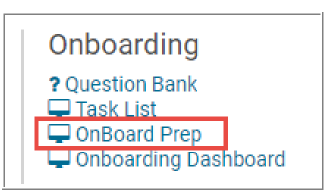
The next sections discusses the actual Onboarding Prep process in detail.

Using Onboarding Prep to Start Self-Service Onboarding

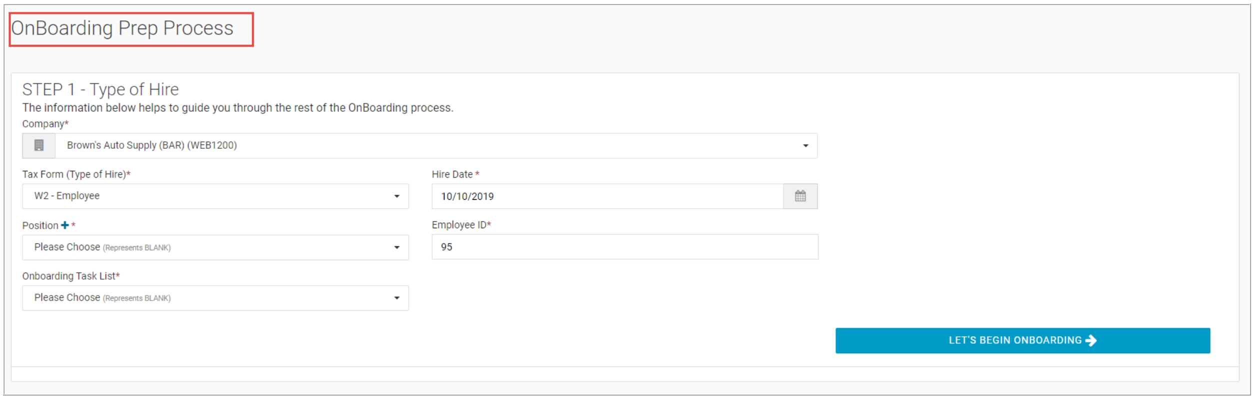
To start the Onboarding Prep process, the first place you go to is to the **Onboard Prep** screen to begin the onboarding process and get the new hire's preliminary information into the system. With the Onboarding Prep process, the user (you) will fill out the basic information and then the new hire employee will complete the process themselves online.

This section describes how to perform the Onboarding Preparation Process for a new hire employee.

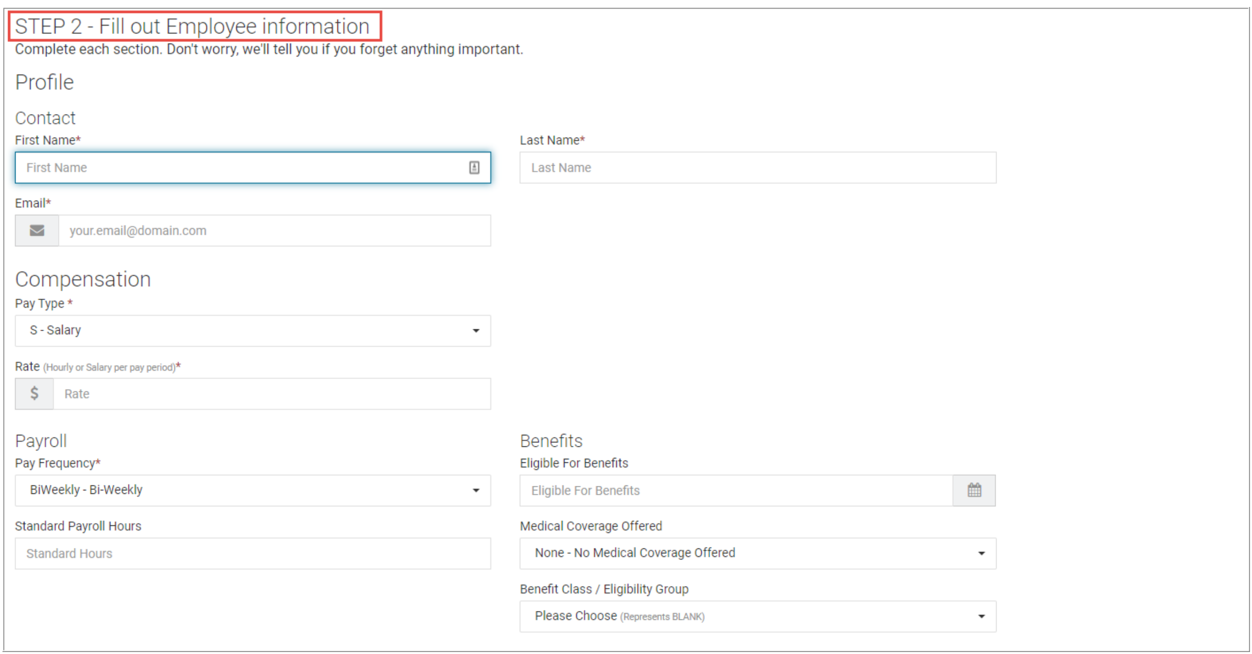
1. Go to **HR Admin – Onboarding – OnBoard Prep**.



2. The system displays the **Employee Onboarding Prep** screen.



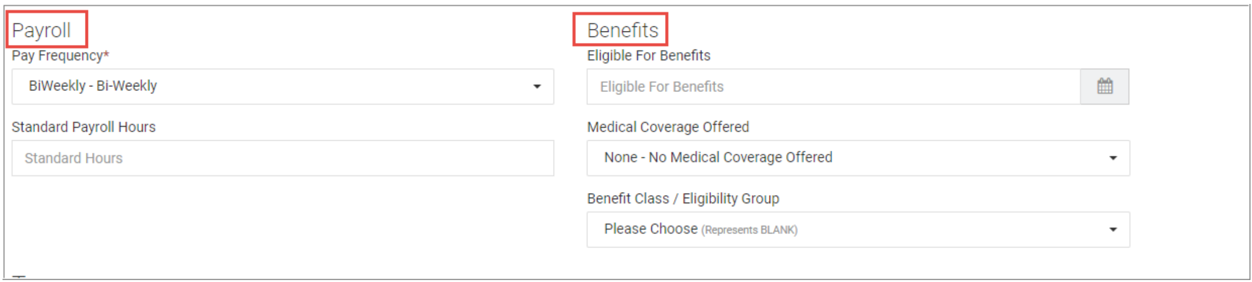
3. Enter the basic employee preparation information, if not already entered. Note that the **Tax Form**, **Position**, and **Onboarding Task List** are required fields. Remember, the **Onboarding Task List** includes the steps that you want the new hire to complete, or documents that you want them to sign off on, before they can submit their application.
4. When the correct information is entered, click the **Let's begin Onboarding** button to be taken to the **Employee Information** screens.



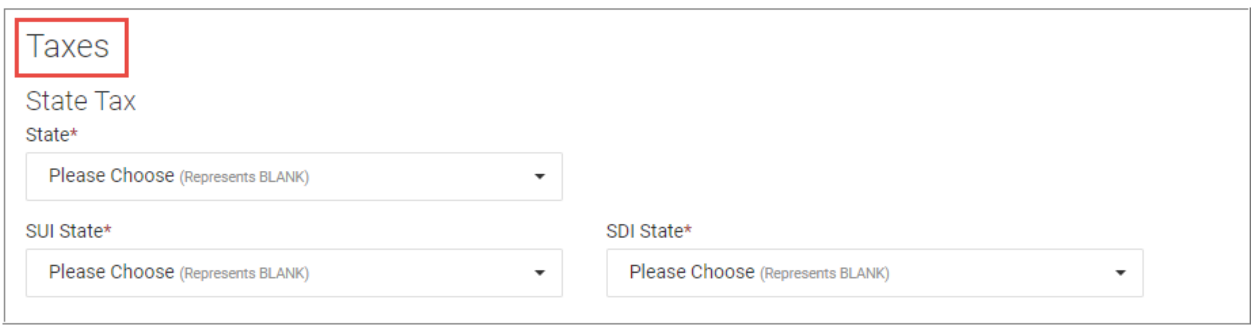
5. Enter the following information:
   - **Profile** information (First Name, Last Name, and Email).

     The **Email** field is important as this is where the Welcome Email will be sent to invite the new hire to complete their onboarding information.
   - **Compensation** information (pay type and rate)

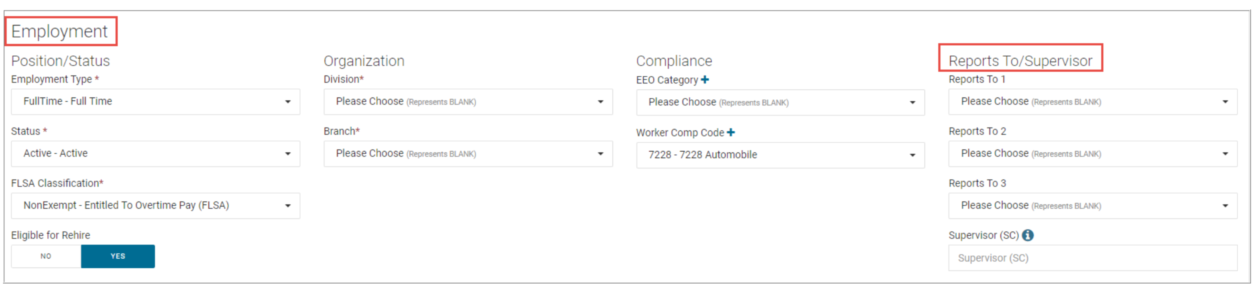
- **Payroll** and **Benefits** information, including Benefit Class / Eligibility Group.



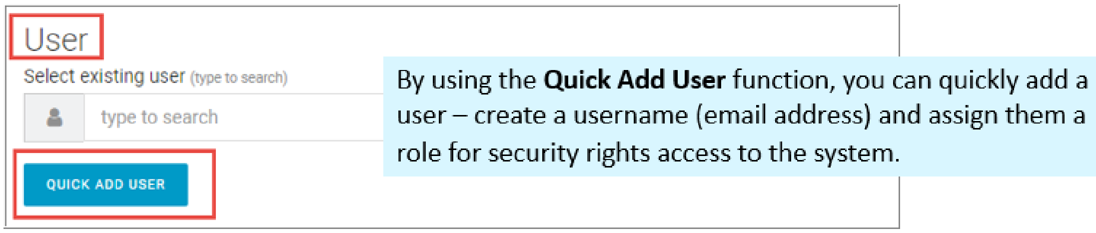
- **Tax** information (State, SUI State, and SDI State – all required fields)



- **Employment** information (position status, DBDT level, compliance information and reports to/supervisor)



- **User** information. (A new hire must also be set as a user in the system for security purposes.) While the User field is not required at this time, it is recommended.



- User defined custom fields (use to create up to three custom fields).

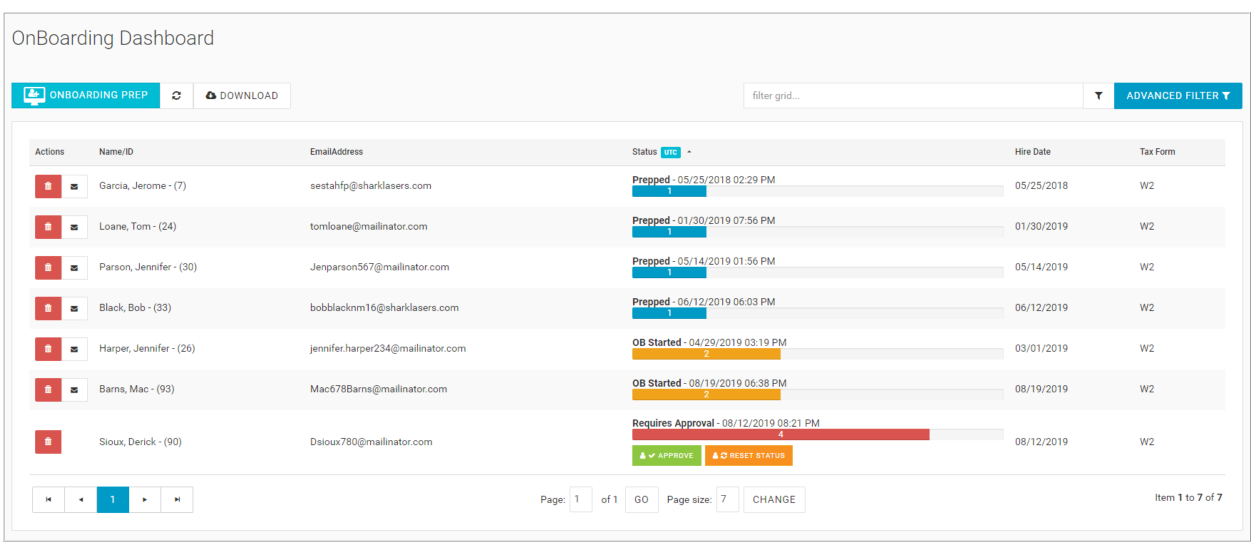
6. Click the **Submit OnBoarding Request** button at the bottom of the screen when complete:

Note: Remember that usernames (emails) must be unique to the system. Advanced HR 2.0 will verify that the new username isn't already being used. **Quick User Add** is meant as a fast way to add a user to the system with the most important fields. If other details about the user are to be entered, go to the User List (**HR Admin – Company – User List**) page after completion here to review or add those other details.

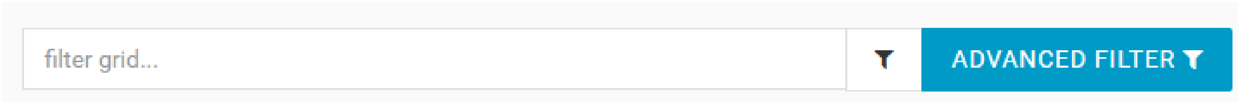
The new hire is now prepped for onboarding. The system displays the **Onboarding Dashboard**. See the next section of this guide.

OnBoarding Dashboard

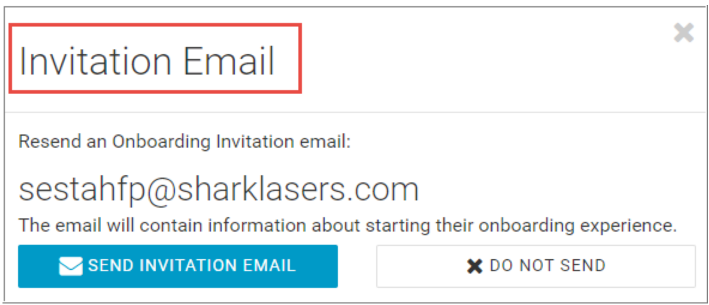
The **OnBoarding Dashboard** provides a summary for the Administrator of all employees who are in the process of being onboarded – those who have had the Onboarding Prep process performed – described in the previous section – and are now ready to go.



You can use the filter grid or click the **Advanced Filter** button at the top of the screen to filter the list of employees.

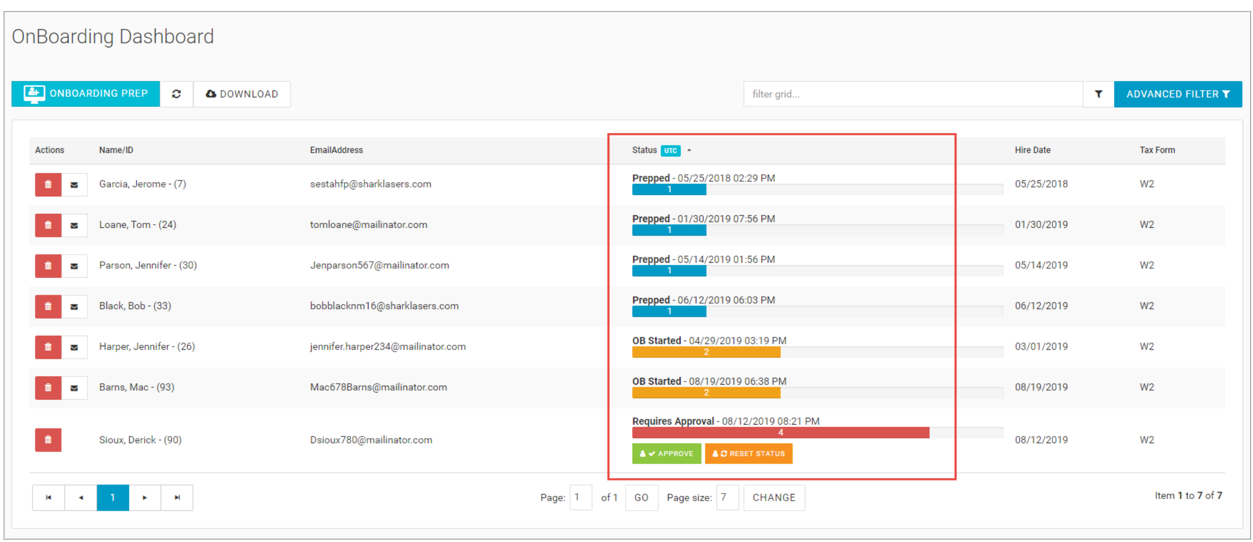


The Onboarding Dashboard allows you to:

- Send an **Welcome Email** by clicking on the envelope icon under **Actions** with sign in instructions for the new hire so that they can complete their paperwork**.** If you hover the cursor over the button, the label **Send Onboarding Invitation** will display.
  The system then displays the **Invitation Email** screen.
- 

  Click the **Send Invitation Email** button.
- **Delete** the onboarding status record using the trash can icon.
- View a complete detail of the onboarding process by clicking on the employee's name.
- Start a new **Onboarding Prep** process by clicking the blue **Onboarding Prep** button.
- **Download** the dashboard in a spreadsheet.

In our example, you can see that the employees shown are all in different statuses of onboarding.



For the New Hire, as stated earlier, they will receive a welcome email with a link and instructions on completing their information. Information for them to complete will include:

- Profile (any information that was not entered previously)
- Classification (gender, ethnicity, education level…)
- Taxes (federal, state, local)
- Emergency Contact information (name, address, phone number…)
- Direct Deposit information
- W-4 setup*
- I-9 setup *
- Background check *
- Company Document(s) (for download, review, *)

  * = Electronic signature currently – future full E-Signature Verification capability.

In addition, for the sections concerning:

- Taxes
- Direct Deposits
- W-4 information
- I-9
- Background check
- Company Documents

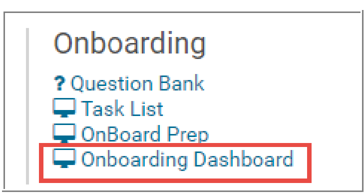
The new hire will need to electronically each before they can proceed to the next section.

Manager/Admin Reviews and Approves the New Hire

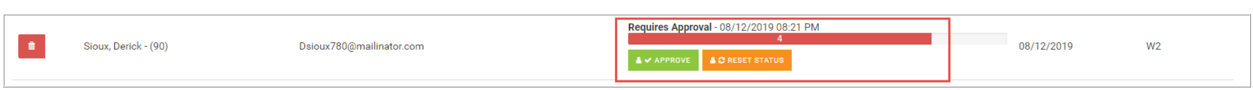
For the Manager/Admin, they will need to use the Onboarding Dashboard to review and approve the new hire.

To display the Onboarding Dashboard:

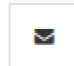
1. Navigate to **HR Admin – Onboarding – Onboarding Dashboard**.



2. The system displays the **Onboarding Dashboard** summary page.

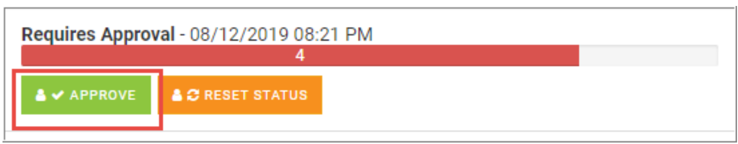


From the **Onboarding Dashboard** summary page you can:

- Send an onboarding invitation by clicking on the envelope icon  under the **Actions** column. This will send an email with sign in information for the new hire so they can complete their paperwork.
- Delete the onboarding status record by clicking on the trash can icon  under the **Actions** column.
- View a complete detail of the onboarding process by clicking on the employee's name.
- Start a new **Onboarding Prep** process by clicking the **Onboarding Prep** button 

at the top of the screen.
- **Approve and create an employee** whose **Status** is **Requires Approval** by clicking the **Approve** button 

on the row for that employee.



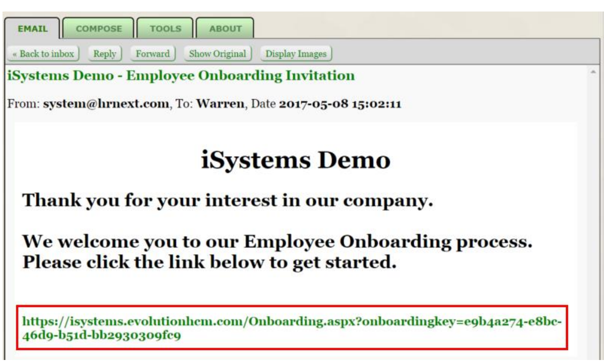
- Reset the **Status** back to **Started** for an employee whose **Status** is **Requires Approval** by clicking the **Reset Status** button 

on the row for that employee.

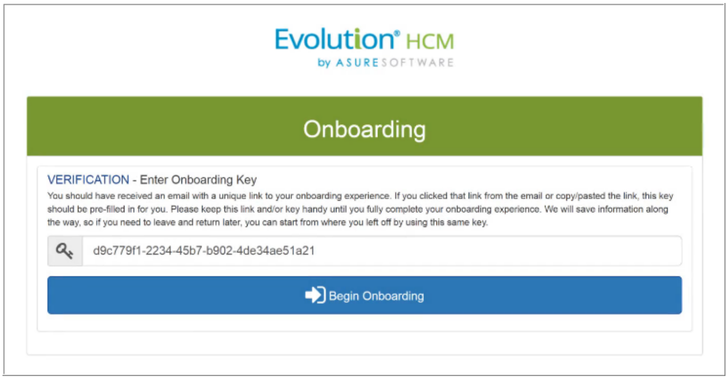
Employee Receives Access to Advanced HR 2.0 to Complete Onboarding

When an Onboarding Invitation is sent, the employee is given access to Advanced HR 2.0 to complete their information and any Onboarding Tasks.

The employee receives an email similar to the following sample with a link to access the system:



When the link is selected, the employee will be taken to following screen to begin the Onboarding process:

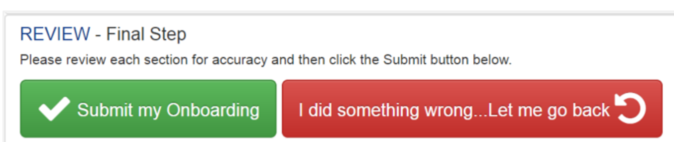


The employee will be walked through completing their pertinent information. Remember, this information was defined in the **Onboarding Task List**:

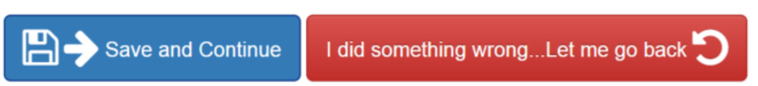
- Profile (any information that was not entered previously)
- Classification (gender, ethnicity, education level…)
- Taxes (federal, state, local)
- Emergency Contact information (name, address, phone number…)
- Direct Deposit information
- W-4 setup*
- I-9 setup *
- Background check *
- Company Document(s) (for download, review, *)

    * = Electronic signature currently – soon to have full E-Signature Verification capability.

When all information has been entered, the employee will have the option of submitting or going back and editing:

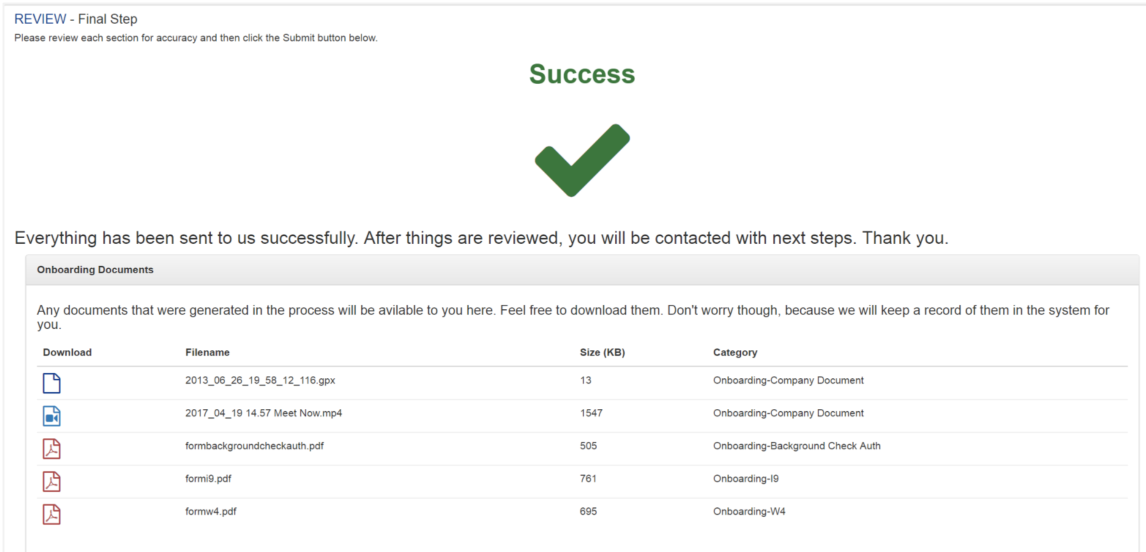


Note: After each task is completed, the employee selects the **Save and Continue** button to proceed:



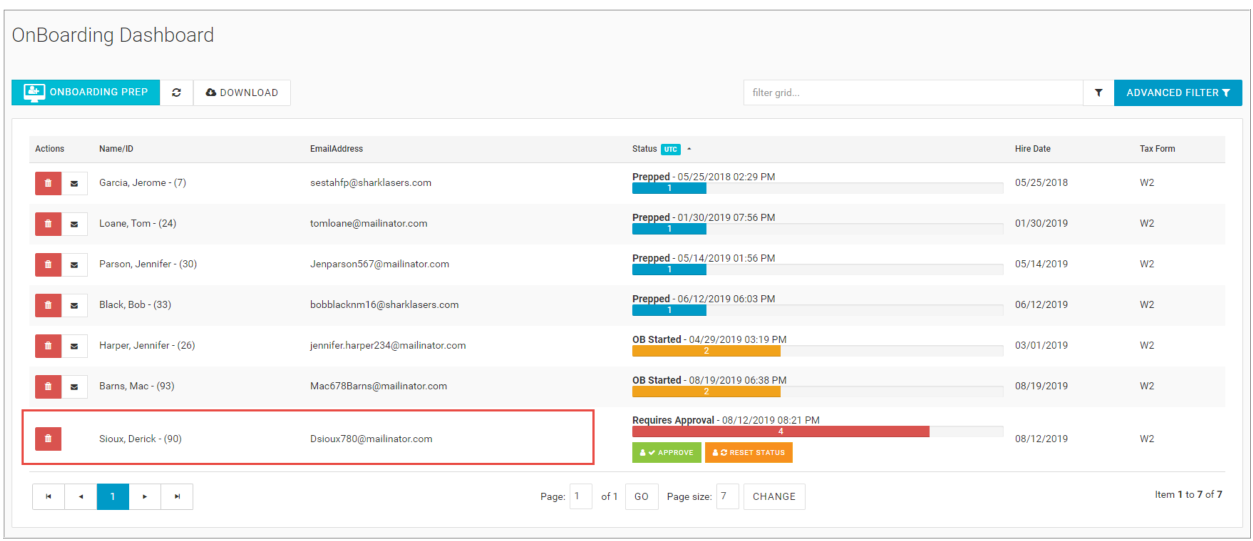
Once selected, a new task will open up.

Once the information has been submitted, the employee will get a **Confirmation Screen**:



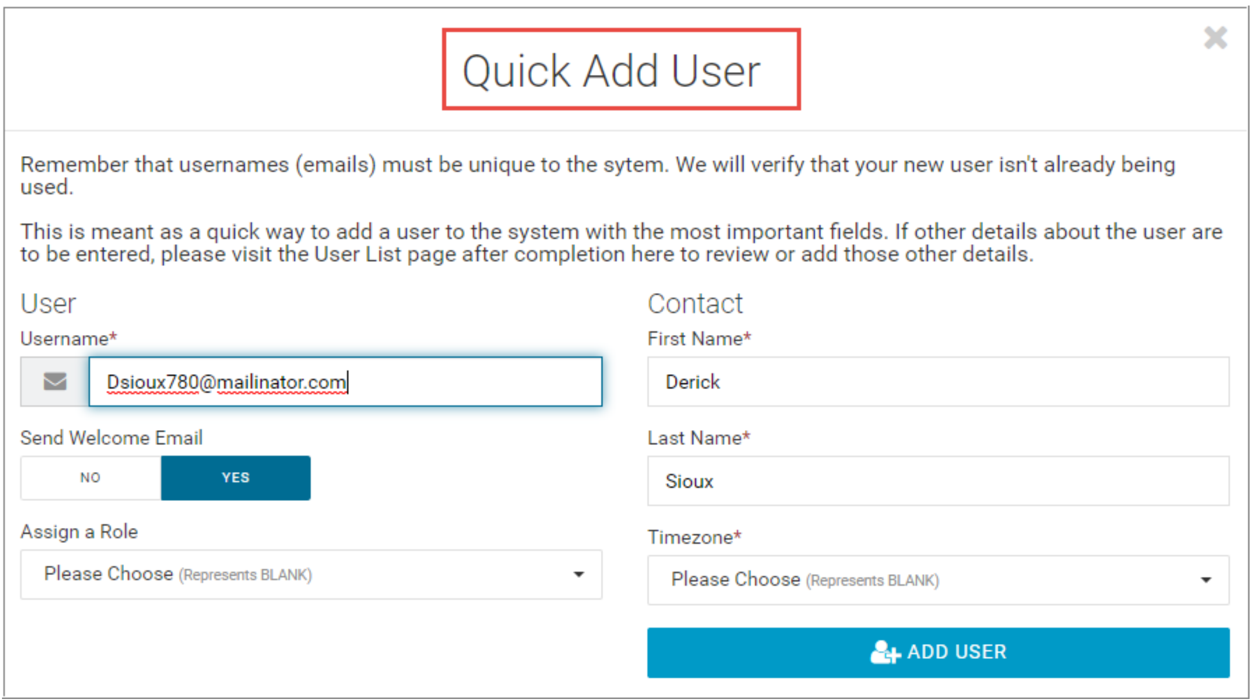
Managers/Administrators Approve the Employee's Onboarding

Base Managers and above roles can approve the new hire. Go to **HR Admin - OnBoarding - Dashboard**. To review the employee's onboarding information, click on their name.



Note that we recommend that you use the **Quick Add User** feature.

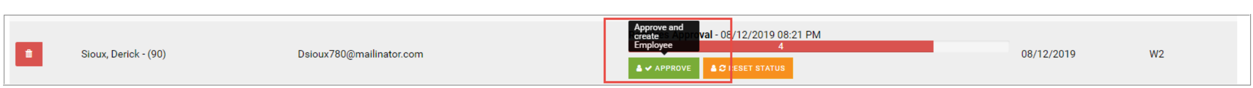
This allows you to create a User in the system so that when they are eventually onboarded, they will already be in the system as a user and ready to go. Make sure that the **Send Welcome Email** toggle is set to **Yes** and that you **Assign a Role**.

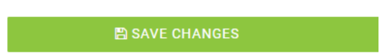


The role you assign will determine the new hire's level of access. Click **Add User** when complete. An email will be sent with details on how the new hire can access the system. Remember to click **Save Changes** before you return to the Onboarding Dashboard.

Clicking on the **Approve** button 

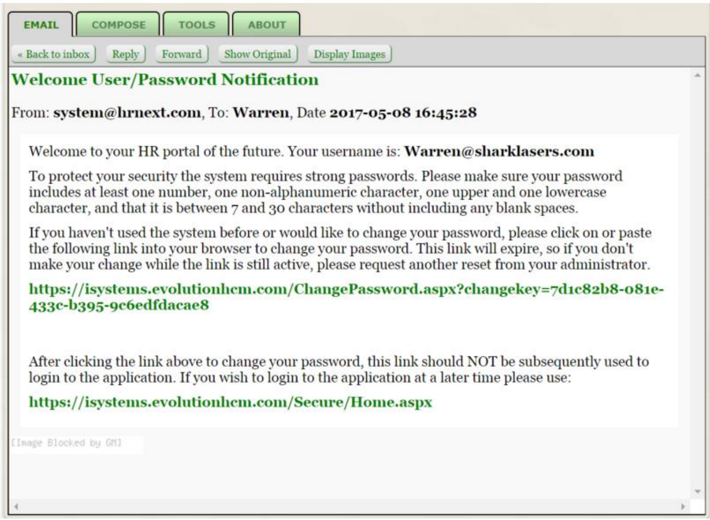
back on the Onboarding Dashboard will allow the HR Administrator to review and approve the employee's information.



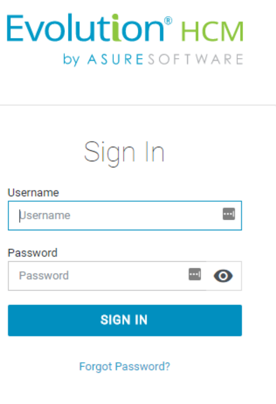
When the user is satisfied, they click **Save Changes**. 

The employee is now fully Onboarded.

Once onboarded, the employee will receive a Welcome User/Password Notification email similar to the following sample. This email provides the sign in information for the new employee:

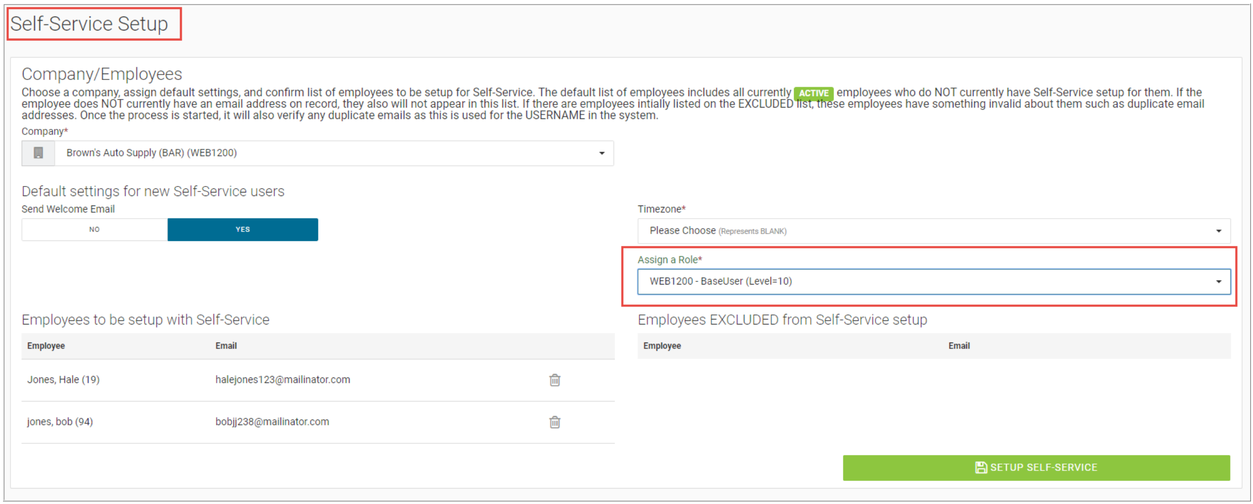


Following the above link, the employee is taken to the Advanced HR Sign In screen:



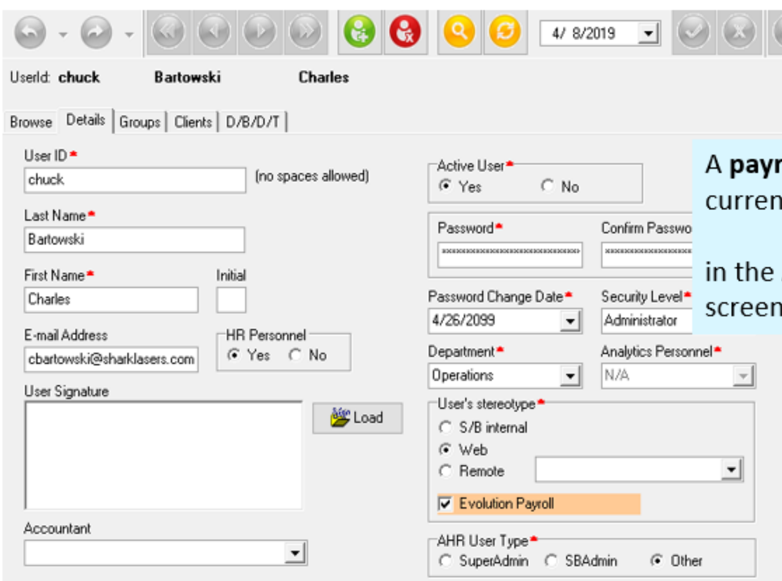
The employee's view is based on their assigned level of access in Advanced HR 2.0. In our example, Warren was given the "**BaseUser**" access level.

Note: Access level can be changed, but its default settings for new employees is set on the **HR Admin – Employee Actions – Self-Service Setup** screen.



Existing Payroll Client Users in Advanced HR 2.0

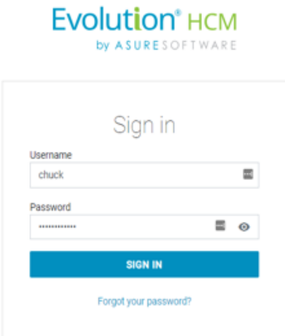
A **payroll user** is a client user who currently exists in **Evolution Classic**, in the **Admin – Security – Users** screen.



A **payroll user** is a client user who currently exists in Evolution Classic:

in the **Admin – Security – Users** screen.

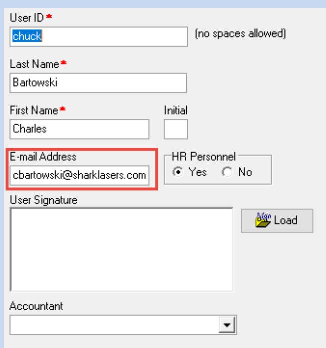
Note: For users, who are already existing client users in the Payroll system, their Advanced HR 2.0 user accounts are **automatically created the first time they sign into Advanced HR** through the Evolution **Single Sign On** (SSO) Sign In screen. You **do not** have to create an existing payroll client user as a new user in Advanced HR. You do, however, have to take additional steps to configure an existing payroll client user in order to be fully functional in Advanced HR. See the section below "Additional Steps the Admin Needs to do to Configure the Payroll Client User"



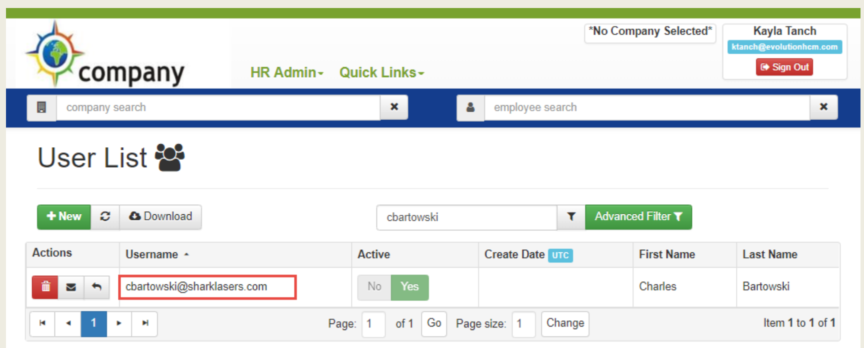
Evolution **Single Sign On (SSO)**
Sign In screen

In Advanced HR 2.0, the **username** of the client user is stated as the email address in their user profile in Payroll.

User Profile in Payroll



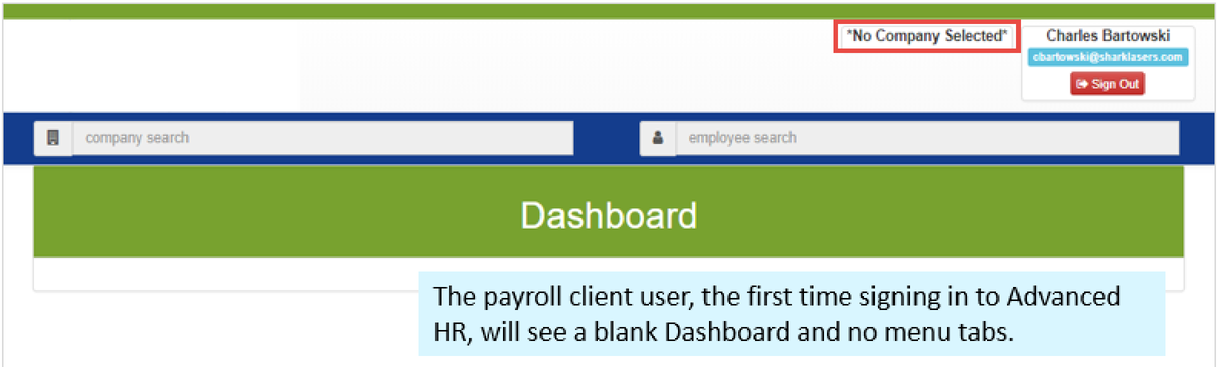
Username of the client user in Advanced HR



However, it's important to note though, unlike a new regular Advanced HR 2.0 user, an existing **Payroll client user** will **always** sign into Advanced HR 2.0 using their existing **Payroll credentials**. Refer to the following two sections.

Payroll Client User First-Time Sign In to Advanced HR

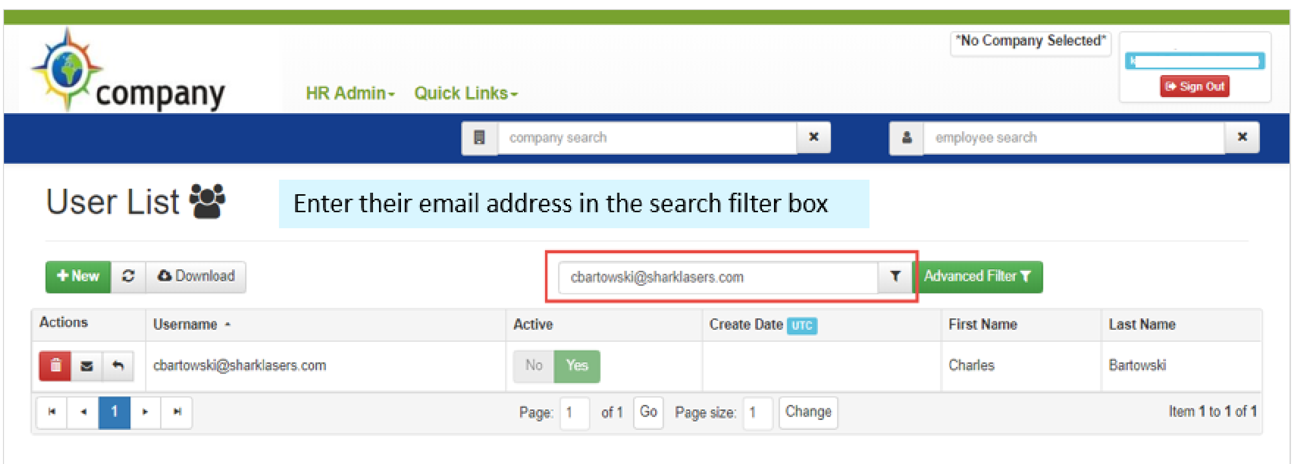
The **first time** that a Payroll client user signs in to Advanced HR 2.0, they will see an empty Advanced HR **Dashboard**. They will not see any menu tabs or the company logo. It will also display "**No Company Selected**" at the top right of the screen. The reason for this result is that the payroll client user in Advanced HR is **not yet linked to a company and has not yet been assigned a role(s)**. These two additional actions must be performed in order for the existing payroll client user to be fully functional in Advanced HR.

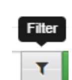


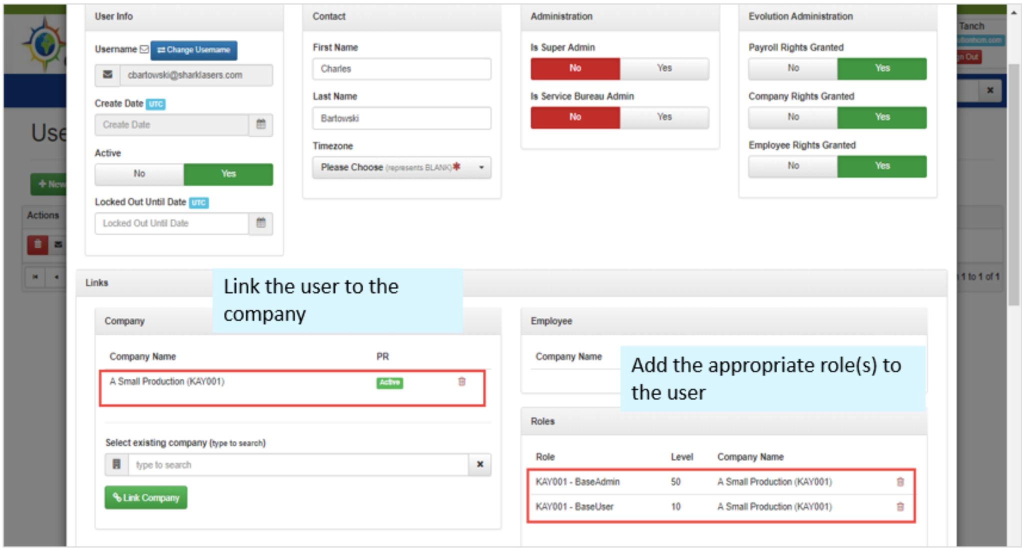
Additional Steps the Admin Needs to do to Configure the Payroll Client User

The Admin will need to take the following additional steps to configure the Payroll client user for Advanced HR 2.0:

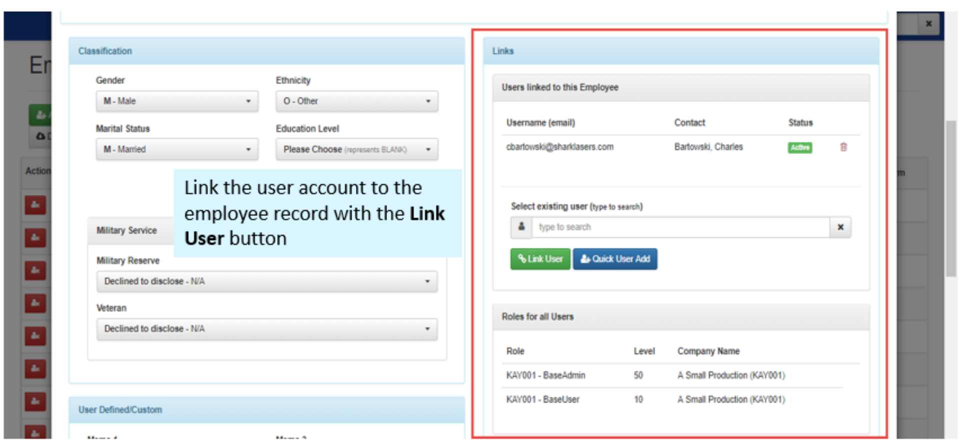
1. In Advanced HR, go to **HR Admin – Company – User List** and locate the user account. One way to do this is by entering the user's email address as the search term in the filter box in the center of the **User List** screen, as shown below.



2. Enter the payroll client user's email address into the Filter box and click the Filter button to the right . Make sure that no company or employee is specified in the company search box or the employee search box at the top of the screen.
3. The screen redisplays and should now show the username you are looking for. Click on the username. The system displays the **User List** details screen for that user.



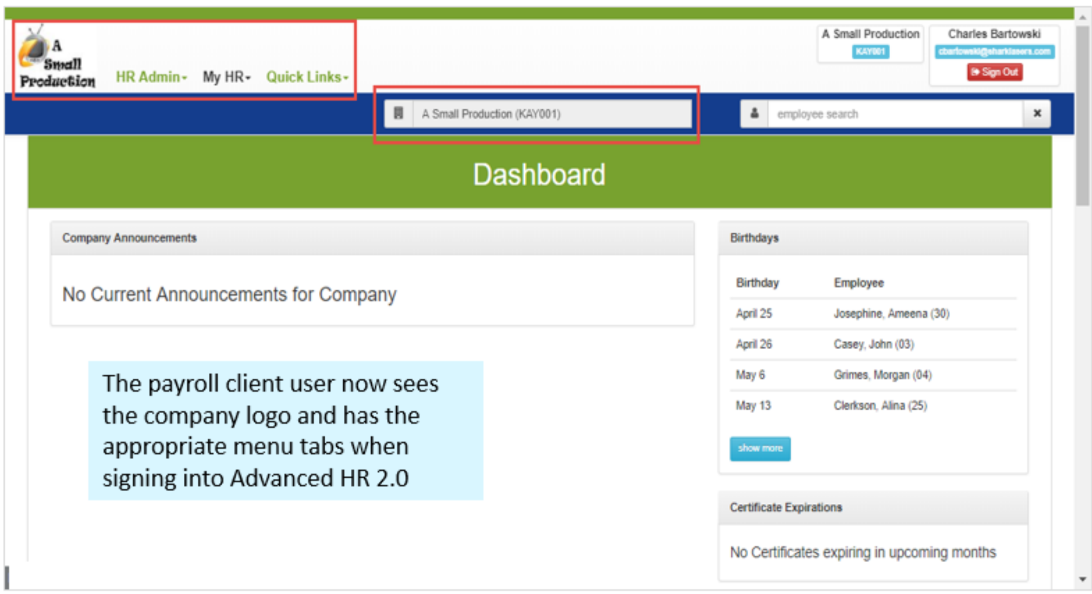
4. In the **Links** section of the screen, under **Company**, use the **Select existing company** dropdown and link the user to a company using the **Link Company** button .
5. In the **Roles** section of the screen, use the **Select Roles** dropdown and click the **Link Role** button to add the appropriate role(s) to the user .
   In our sample above, the payroll client user has been linked to the **A Small Production** company and assigned the roles of **BaseAdmin** and **BaseUser**.
6. Click **Save Changes**.
7. Go to **HR Admin – Employee Maintenance – Employee Summary** screen and locate the employee record there for this user.
8. Scroll down to the **Links** section of the **Employee Summary** screen and search for the user by entering their email address in the **Select existing user** dropdown.



9. Link the user account to the employee record by clicking the green **Link User** button .
10. Click **Save Changes**.

Result: Now, when the **Admin** returns to the **HR Admin – Company – User List** and locates the user's account, the **Employee** section is populated and shows that the user account is now linked to the employee record.

When the **user** next signs in to Advanced HR 2.0, they will see both the company's logo (**A Small Production** in our example) and the appropriate menu tabs (**HR Admin**, **My HR**, and **Quick Links**) at the top left of the Dashboard based on their role(s). A sample is shown below.



Granting Evolution Payroll Access to an Advanced HR User

A regular existing user in Advanced HR 2.0 will **not** have access to Evolution Payroll, unless the Admin takes additional action as described below.

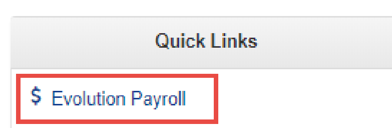
A high level summary of what the Admin does is the following (detailed steps are listed below). First, go to the **User List** screen for the user and grant them **Payroll**, **Company**, and **Employee Rights** in the **Evolution Administration** section.

Next, assign the user the company's **BaseAdmin role** in order to be able to access Evolution Payroll.

The Admin sends a **Reset Password** email to the user (or the user can use the Forgot Password link) to change their password.

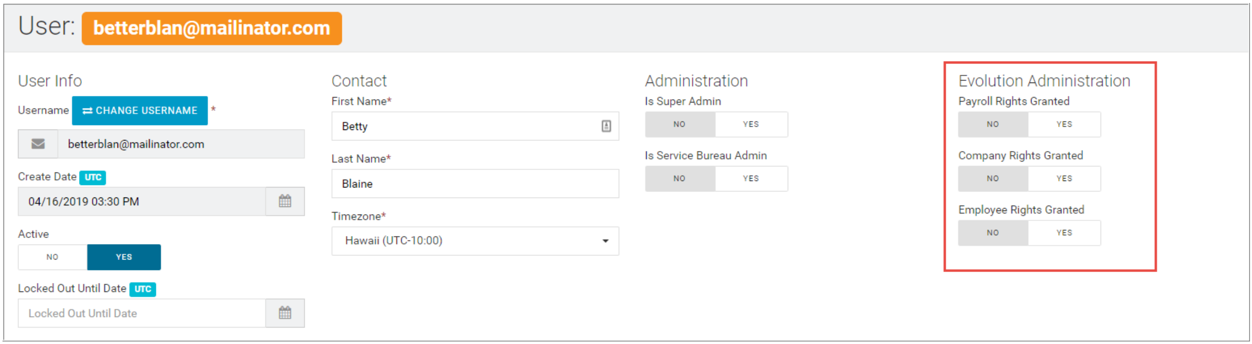
Finally, the Admin assigns the company to the user in Evolution Classic.

The result of these actions are that the user will then be able to access Evolution Payroll from within Advanced HR 2.0. The user will have an **Evolution Payroll** link on the **Quick Links** menu.

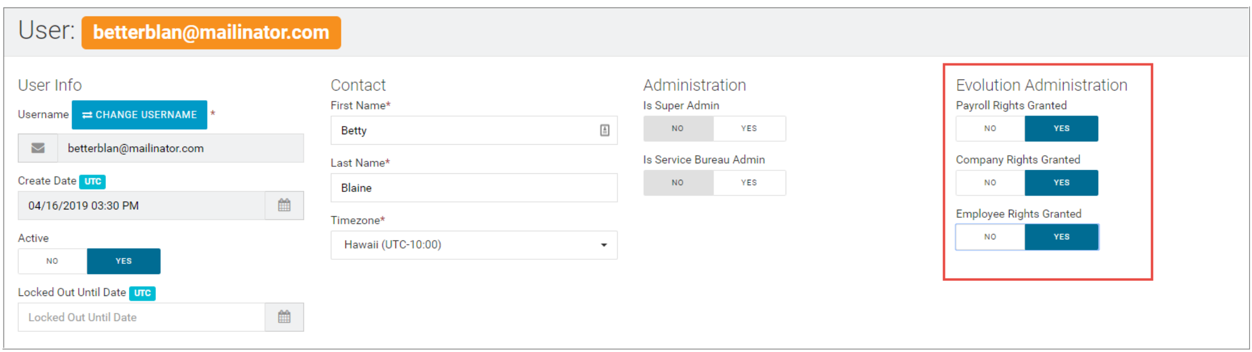


To grant Evolution Payroll access to an Existing Advanced HR 2.0 user:

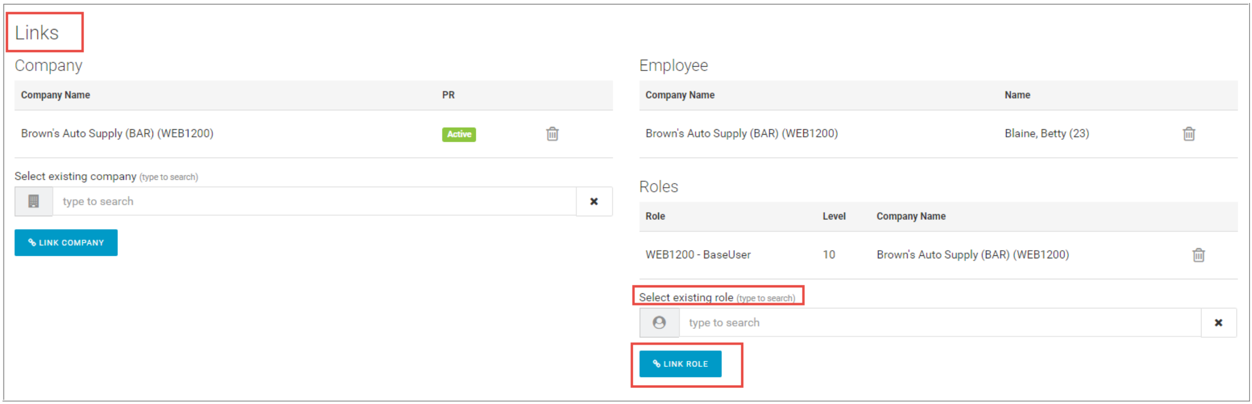
1. The Admin goes to the **HR Admin – Company – User List** screen.
2. Click on the row for the user to which you want to grant Evolution Payroll access.
3. The system displays the **User List** details screen for that user.



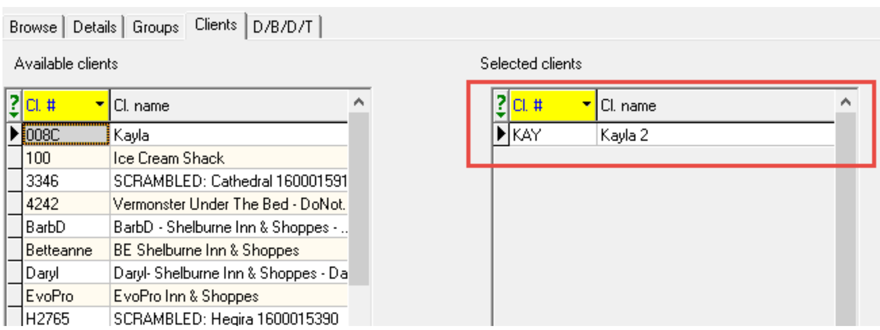
4. Notice in the **Evolution Administration** section on the right, all three **Rights** toggle switches are set to **No** (red).
5. Change the **Payroll Rights**, **Company Rights**, and **Employee Rights** toggle switches to **Yes** (green) as shown below.



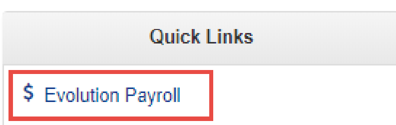
6. Click the **Save Changes** button.
7. The system then creates this user in **Evolution Classic**.
8. The following additional steps need to be done. The first by the user (or the Admin) and the next two steps by the Admin:
   - The **user** will then need to change their password on the **Single Sign On** (SSO) screen. Or, the **Admin** can have the system send a **Reset Password email** to the user by using the **Reset Password** function on the **HR Admin – User List** screen.
   - The **Admin** will need to assign the **[CompanyCode] – BaseAdmin** role to the user in Advanced HR so that the user will be able to access Evolution Payroll. The admin does this on the **User List** screen, scroll down to the **Links** section, the **Select an Existing Role** dropdown, select the role, then click the **Link Role** button.



- Finally, the **Admin** must sign on to Evolution Classic and assign the appropriate client to the user, similar to the example shown below. Do this on the **Admin - Security – Users**, select the user, and then click on the **Clients** tab.



Result: The user will then be able to access Evolution Payroll from Advanced HR, using the **Quick Links - Evolution Payroll** menu item.

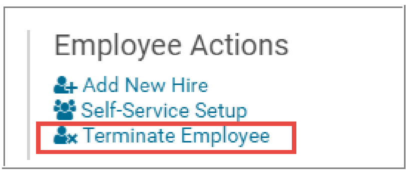


Terminating an Employee

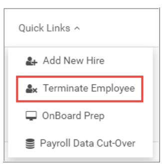
Terminating an employee is a simple process in Advanced HR 2.0. You must have security access to do so – this includes **Super Admins**, **Service Bureau Admins**, and **Base Admins**. You can only terminate an Active status employee.

To terminate an employee:

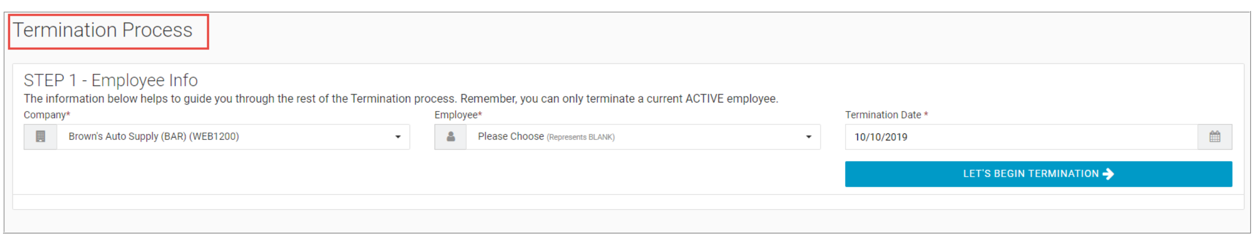
1. Go to **HR Admin – Employee Actions – Terminate Employee**.



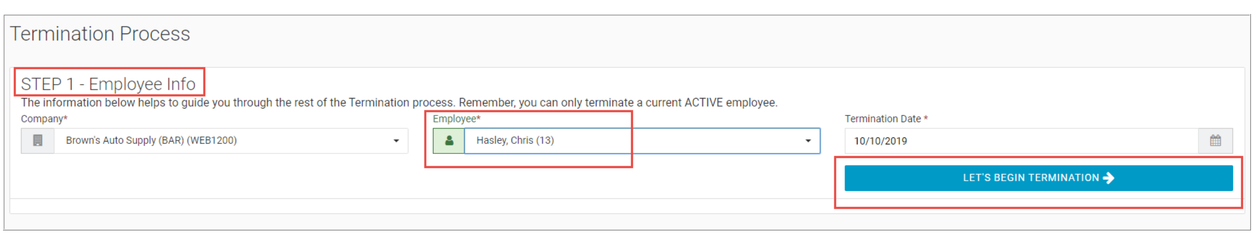
Note: Terminating an employee can also be accessed from the **Quick Links** menu item at the top of the screen.



2. When the **Terminate Employee** option is selected, the system displays the **Termination Process** wizard. This wizard will walk you through the process of terminating an employee.

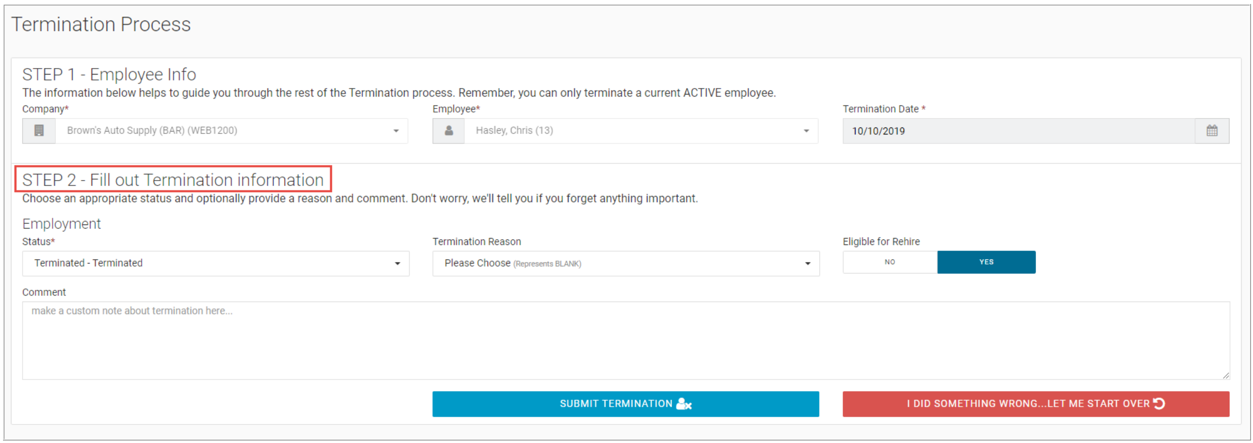


3. In **Step 1**, select the **Company**, the **Employee**, and the **Termination Date**. The **Termination Date** will default to the current date. However it can be changed by selecting the calendar icon.



4. Click the **Let's begin Termination** button.

5. In **Step 2**, select the **Status, Termination Reason,** and if the employee is **Eligible for Rehire**. You can also add any comments in the **Comment** editable field.



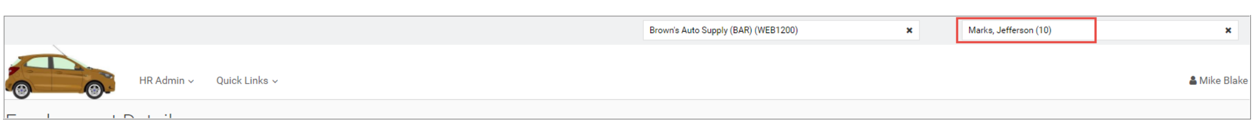
6. Click the **Submit Termination** button when complete.

Note: After Terminating the employee, remember to adjust their User Security Role accordingly. Go to **HR Admin – Company - User List**. Click on the user. If, for example, they were a Base Manager, that level should be removed so they only have access as a Base User. If you choose, you can also delete or make them inactive as a user.

Rehiring an Employee

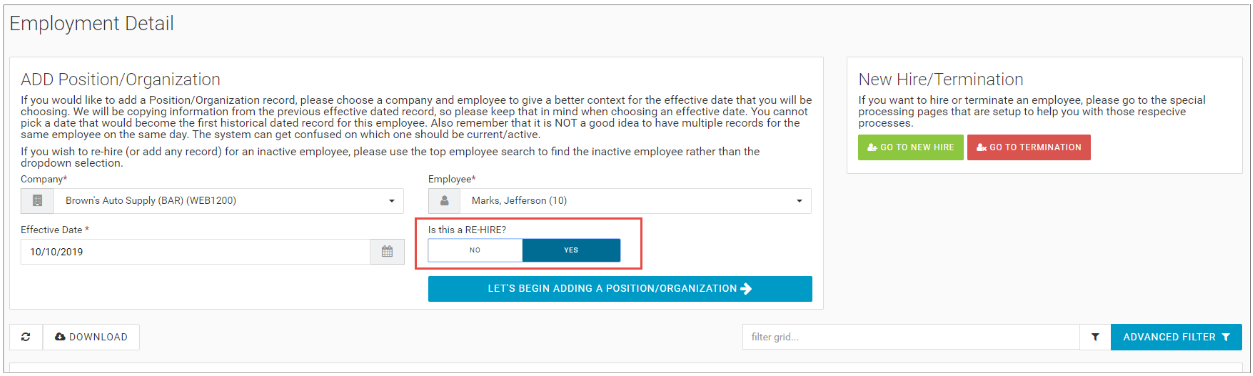
When an existing terminated employee is being rehired you can update the employee Status from **Terminated** to **Active** using the Rehire process.

1. To Rehire an employee, make sure you are first locked into that company **and the employee** using the Company and the Employee search boxes in the upper-right section of the **Dashboard**:

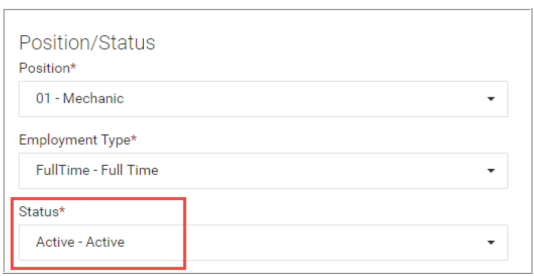


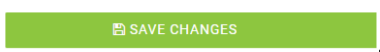
2. If the employee is Eligible for Rehire, go to the **HR Admin - Employee Maintenance - Employment Detail** screen. Since you are locked in, the employee's name will appear in the **Employee** dropdown.

If you did not first lock down the employee, then the terminated employee would not appear here in the **Employee** dropdown on the Employment Detail field because only Active employees would normally display here.



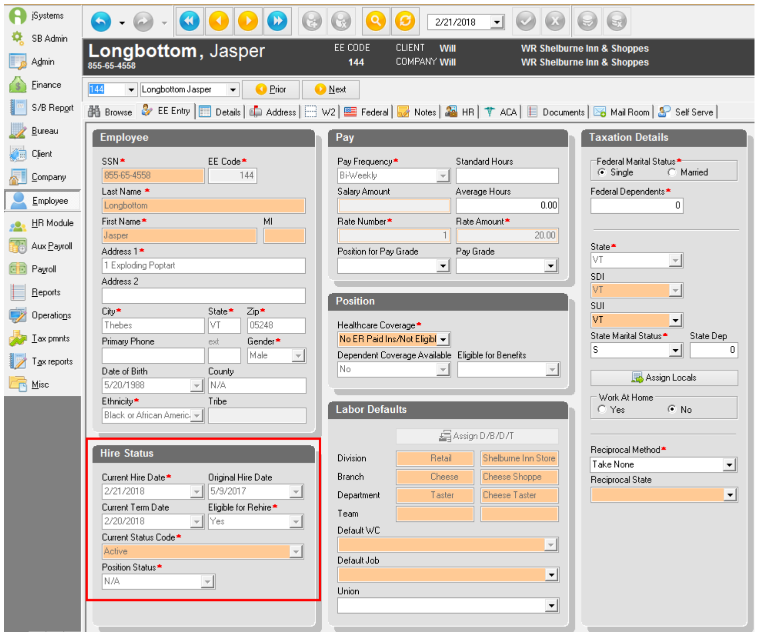
3. Select the **Effective Date** for the re-hire.
4. Set the **Is this a Re-Hire?** toggle switch to **Yes**.
5. Click the **Let's begin adding a Position/Organization** button.
6. The system displays the Details screen. Update any necessary fields and set the **Status** field to **Active**.



7. Click the **Save Changes** button 

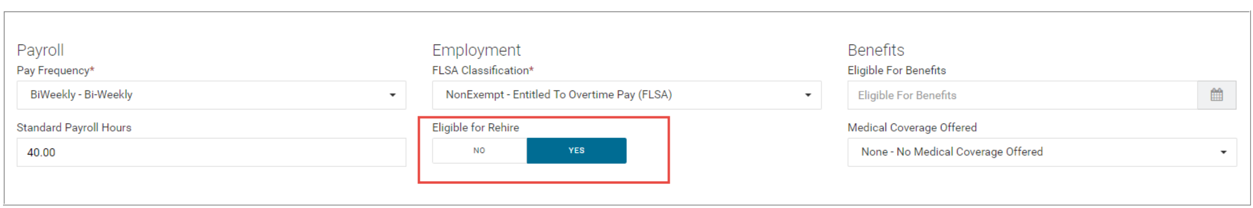
.

The employee is now an **Active** employee. You can verify this by viewing the employee's status in Evolution Classic. Go to **Employee – Employee – EE Entry** tab:



Note: If the system displays a non-eligible for rehire message when you attempt the Rehire process, the system is letting you know that when they were terminated, the employee was marked as **Not eligible for Rehire**.

You should investigate this first. To proceed, if you need to update this in order to complete the rehire, go to **HR Admin – Employee Maintenance – Employee Summary**, and select the terminated employee. Scroll down to the **Employment** section and change the **Eligible for Rehire** toggle switch from **No** to **Yes**, then **Save** your changes. Then you can go back and complete the Rehire process.



Also be aware that the Rehire process does not activate the new hire self-service onboarding process. The employee will not be prompted to perform online forms or any tests.

Appendix 1: Glossary of Terms

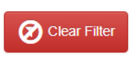
A New Vocabulary

As with any new product, Advanced HR 2.0 introduces some new terms that you should become familiar with.

Term	Description
Alternate Rate	This menu option displays employee's additional rates when the employee has multiple rates. See *Compensation*.
Anonymous Role	The first default security level in Advanced HR 2.0 (Anonymous) is for someone who is unknown to the system – who has no security level access set. This could be an applicant who is filling out an onboarding application or someone who isn’t assigned a role in general. Users that are not signed in are anonymous users – and thus can only see the pages that do not require signing in – specifically the application and onboarding sections of Advanced HR 2.0. Permissions are assigned to the anonymous user role to suppress visibility or make fields required by applicants or onboarding candidates.
Applicant Tracking	The Applicant Tracking module of Advanced HR 2.0 allows users to post jobs, monitor applicant status, set communications, and create a library of questions for various job postings.
Application Version	Part of the Applicant Tracking system; before a job can be posted, the user must first create an Application Version. An Application Version is a set of parameters that can be created, titled, saved, and attached to any number of Job Postings, thus streamlining the process.
Base Admin Role	When a user who has been assigned a Base Admin signs in, as with any other role, they will be taken to the Dashboard. The Dashboard for a Base Admin is similar to the Base Manager but also contains additional menu items and functionality. This role is most likely the highest end user role you (the Service Bureau) will assign at the client level.
Base User Role	The Base User role is what every user should be set to. When a user who has been assigned a Base User signs in to Advanced HR 2.0, they are taken to the Dashboard. **Note:** For a Base User, the Dashboard will display their own information only.
Clone a Role	Administrators have the ability to clone a security role and associate it to a specific company. The term 'clone a default role' is more accurate than to refer to 'copying' a role. When you clone a default base role, it is assigned to that

Term	Description
	specific company. Using this method, you can make changes and add or remove permissions to the default security roles for a specific company but still leave the original default security roles unchanged for other, new clients. Cloning allows you to copy a role multiple times, or allows the user to add or take away permissions to a role. Permissions are what define user access. It is important to remember that if you alter a default role, all cloning of that role will reflect the original alterations.
Company Dashboard	The Dashboard functions as the employee portal. This will allow any employee access to their personal information in Advanced HR 2.0.
Compensation	This menu option displays the employee's Primary Rate or Salary amount. See *Alternate Rate*.
Data Import Tool	Advanced HR 2.0 has the functionality to import data directly into pre-selected employee fields. This function is called the Data Import Tool. Utilizing a Microsoft Excel spreadsheet template that the user downloads, allows for entry of multiple employee information. **Note:** The Data Import Tool will not create information or documents, such as a Certificate or a Training Class. The tool will only import data and attach it to an employee. It is also important to remember that the Data Import Tool requires a location to import the data into it. For example, if a user wants to import Class information, the Class needs to have already been created and assigned to an employee. The Data Import tool can also be used to import selected data from My HR Admin to Advanced HR 2.0
Data Migration	This refers to the process of migrating data from Advanced HR 1.0 into Advanced HR 2.0 immediately following a Payroll Data Cutover.
Data Migration Tool	For companies that were on Advanced HR v1.0, you have the ability to migrate selected company and employee information into Advanced HR 2.0 by using the Data Migration Tool. Using the Data Migration Tool will now be a normal part of performing the Payroll Data Cutover process to onboard a new company – use the Data Migration Tool as an additional, optional, final step at the end of the Payroll Cutover process.
Job Posting Key	This is the URL that you can place on job boards in order to direct applicants to the application in Advanced HR 2.0. This is also where you can control the status of a posting by toggling the status to **No** or **Yes**.
Notifications	Notification functionality enables you to send email messages to designated recipients. Receiving automatic notifications regarding their employees is a time saver for managers and administrators. Advanced HR 2.0 comes equipped with a full set of event-based and date-based notifications. Event-based notifications operate behind the scenes and are generated automatically. No setup is required. However, for date-based notifications, there is some setup effort required by the user. All notifications have default template messages that can be edited at any time.

Term	Description
	Notifications can also be cloned to create a custom notification.
Onboarding Prep	Onboarding Prep, also referred to as *Self-Service Onboarding*, is the process an Admin will begin and then have the new hire complete the onboarding themselves online.
Payroll Cutover	Formerly known as Company Onboarding in Advanced HR v1.0. This is the initial load of data that comes from Evolution to Advanced HR 2.0. The company must exist and have a Status of Active in Evolution Classic in order to perform the Payroll Cutover process. After the cutover is successfully executed, Advanced HR 2.0 will become the system of record.
Permissions	Permissions in Advanced HR 2.0 allow the Service Bureau Admin or the Super Admin user to set security authorization for different Resource functionality. Advanced HR 2.0 comes by default with thousands of Permissions right out of the box. These Permissions are divided into the following categories: Form, Control, Menu Items, and Database. Permissions can be role based and/or user based.
QR Code	A QR (Quick Response) Code is a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone. In Advanced HR, it is used during the optional Two-Factor Authentication process. See *Two-Factor Authentication*.
Rapid Enroll	The Rapid Enroll feature (HR Admin – Employee Maintenance – Classes – Rapid Enroll) lets the user enroll multiple employees at once into a training class. It also allows you to assign grades or add notes to employees all at one time. It's important to remember that Rapid Enroll cannot create a class. Its function is enrollment in an already existing class only.
Resources	In Advanced HR 2.0, every clickable item in the system is known as a Resource. The default security roles allow different levels of access to these resources. To change a security role to restrict or to allow access to a Resource, the service bureau will need to set the Permission on the Resource itself. Resources are what the user is giving (security) Permissions to (see Permissions above).
Self-Service Setup	Self Service Setup is the process of creating users en masse (in mass) or batches. An HR Admin menu option that allows for multiple employees to be given access to Employee Self-Service. This will create users for all selected employees and attach the user to the Employee Record.
Service Account User	The Service Account User is a non-user account in Evolution Classic for the purpose of enabling Single Sign On access. This is the Integration User.
Service Bureau (SB) Admin Role	The Service Bureau Admin (SB Admin) is a step below the Super Admin level of access. The functionality for the SB Admin user level is geared more toward the administrative side. The primary difference between a Service Bureau Admin and a Super Admin is the Service Bureau Admin users can be excluded from

Term	Description
	accessing specific companies – such as when they are responsible only for certain companies, or should not see specific companies – such as the Service Bureau's home company.
Short Term Disability (STD)	Short-term disability insurance pays a percentage of your salary if you become temporarily disabled, meaning that you are not able to work for a short period of time due to sickness or injury (excluding on-the-job injuries, which are covered by workers compensation insurance). Advanced HR supports STD benefit plans.
Single Sign On (SSO)	Evolution Single Sign On (SSO) allows the user to sign in to a central location and access both Evolution Payroll and Advanced HR 2.0. With this functionality, which is part of the 'Stowe Release', a user signs in with a single ID and password to gain access to both Payroll and Advanced HR 2.0 without using different usernames or passwords. It is important to note that Single Sign On (SSO) functionality is for those users who need to access Evolution Payroll functions AND Advanced HR 2.0 functions. For those users who only need Advanced HR 2.0 access, they will sign in as normal, and do not need SSO functionality, although they will also use the new Evolution SSO Sign In screen.
"Sticky" Filter 	A Filter in Advanced HR may be what is referred to as "Sticky." For example, the Advanced Filter on the Employee Summary screen. A "Sticky" filter means that if you activate the Filter by applying some settings, then anytime you display the Employee Summary, the system will apply your filter settings to the list of employees it displays in the screen grid. To inactivate ("unstick") the filter, you must clear the settings on the Advanced Filter screen by clicking the Clear Filter button, shown at left.
Super Admin Role	Super Admins are the highest level of security role. Super Admins have access to all of the clients associated with an account in Advanced HR 2.0. Super Admins also have the ability to Exclude companies from users.
Two-Factor Authentication	Two-factor authentication is a security tool that requires a user's password as well as an additional form of authorization. It adds another layer of security if your password has been stolen, or you use the same password for multiple websites. Two-Factor Authentication (also referred to as "2FA") is an extra layer of security used to make sure that people trying to gain access to an online account are who they say they are. First, a user will enter their username and a password. Then, instead of immediately gaining access, they will be required to provide another piece of information. The most popular form of two-factor authentication (and a preferred alternative to SMS and voice) uses a software-generated time-based, one-time passcode (also called TOTP, or "soft-token"). For information about using Two-Factor Authentication with Evolution HCM products, refer to the following topics on the Evolution Resource Center: *Two-Factor Authentication for Service Bureaus* *Two-Factor Authentication for End Users*