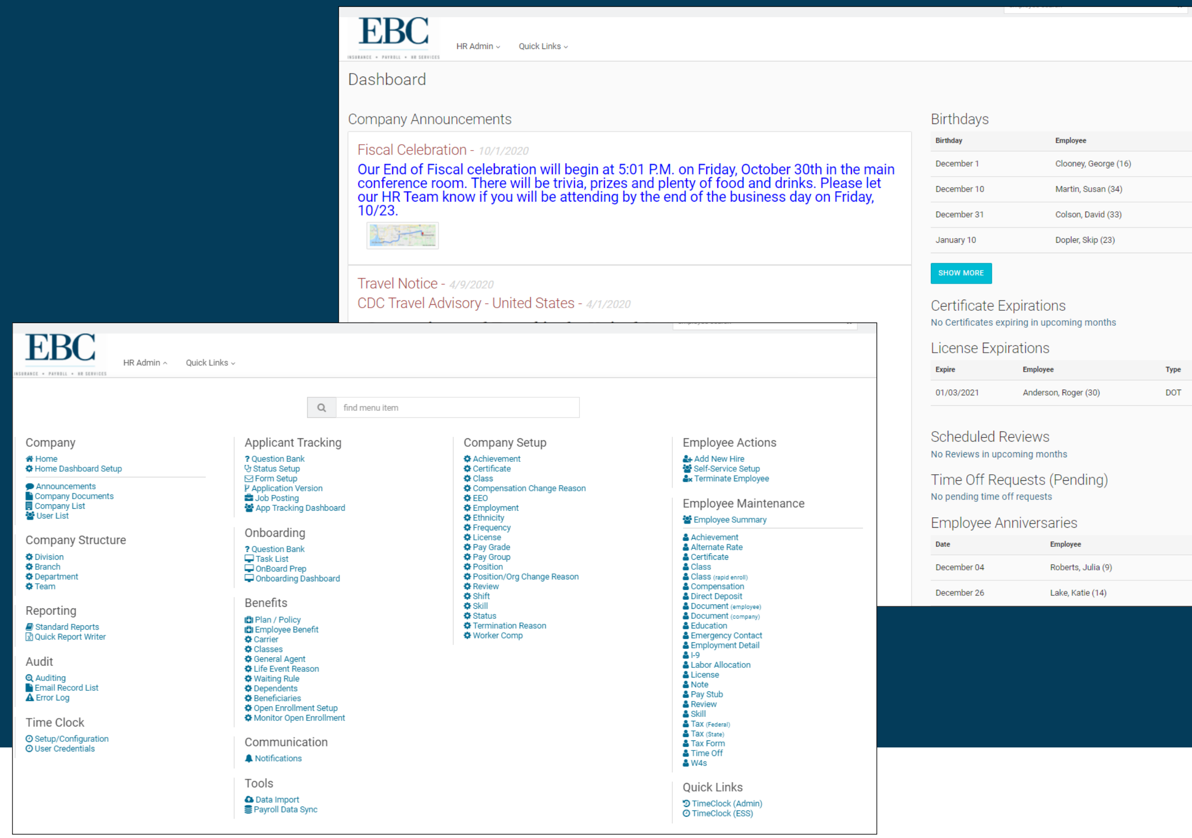
Training Guide



EBC

PAYROLL • HR SERVICES

Advanced HR

Advanced HR Training Guide

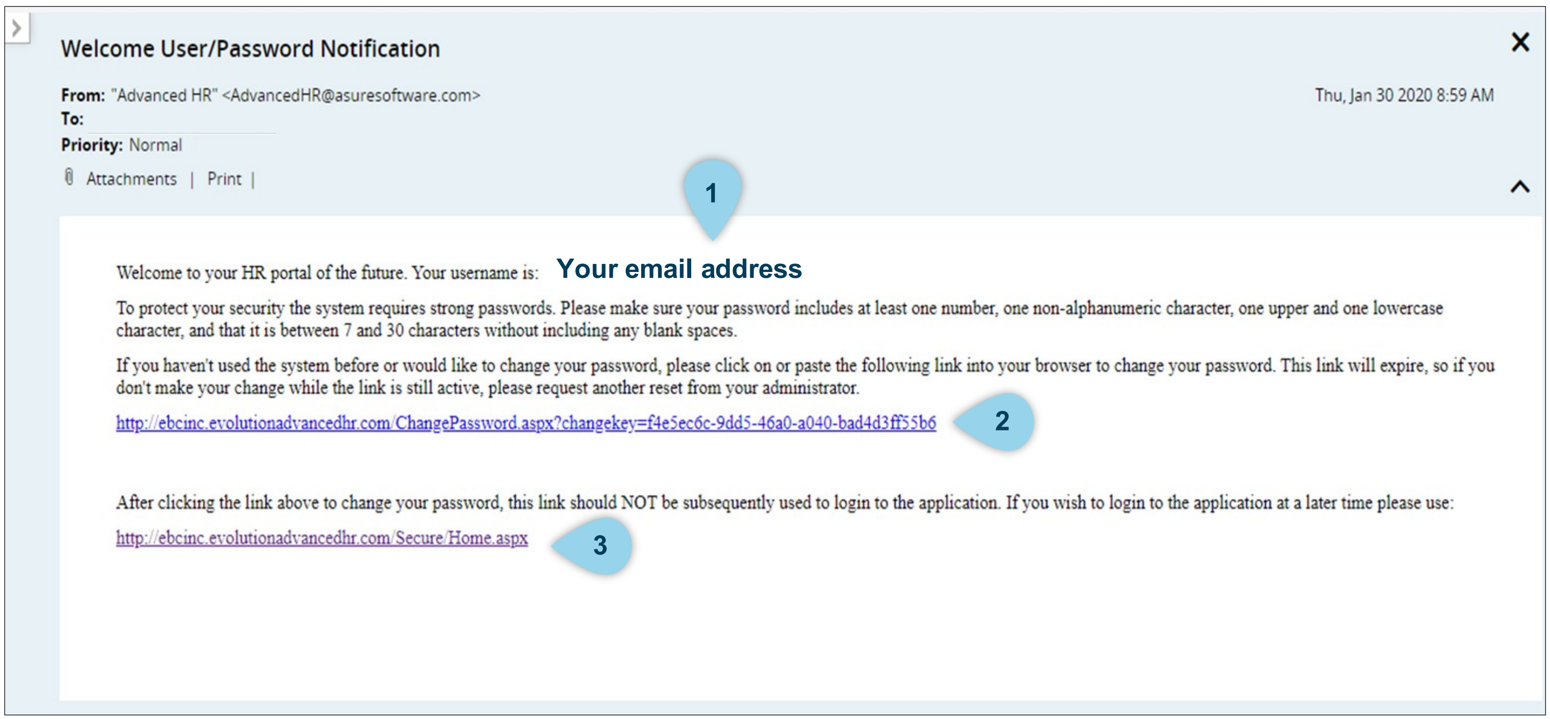
Initial Setup

This section includes information for setting up a new user on Advanced HR.

Welcome Email

Every new user will receive a welcome email. This email includes:

1. The employee's username.
2. A link to create a password for first time users.
3. A link to log in after the initial setup is complete.



Welcome User/Password Notification

From: "Advanced HR" <AdvancedHR@asuresoftware.com>   Thu, Jan 30 2020 8:59 AM
To:
Priority: Normal

Attachments | Print |

1

Welcome to your HR portal of the future. Your username is: **Your email address**

To protect your security the system requires strong passwords. Please make sure your password includes at least one number, one non-alphanumeric character, one upper and one lowercase character, and that it is between 7 and 30 characters without including any blank spaces.

If you haven't used the system before or would like to change your password, please click on or paste the following link into your browser to change your password. This link will expire, so if you don't make your change while the link is still active, please request another reset from your administrator.

http://ebcinc.evolutionadvancedhr.com/ChangePassword.aspx?changekey=f4e5ec6c-9dd5-46a0-a040-bad4d3ff55b6 2

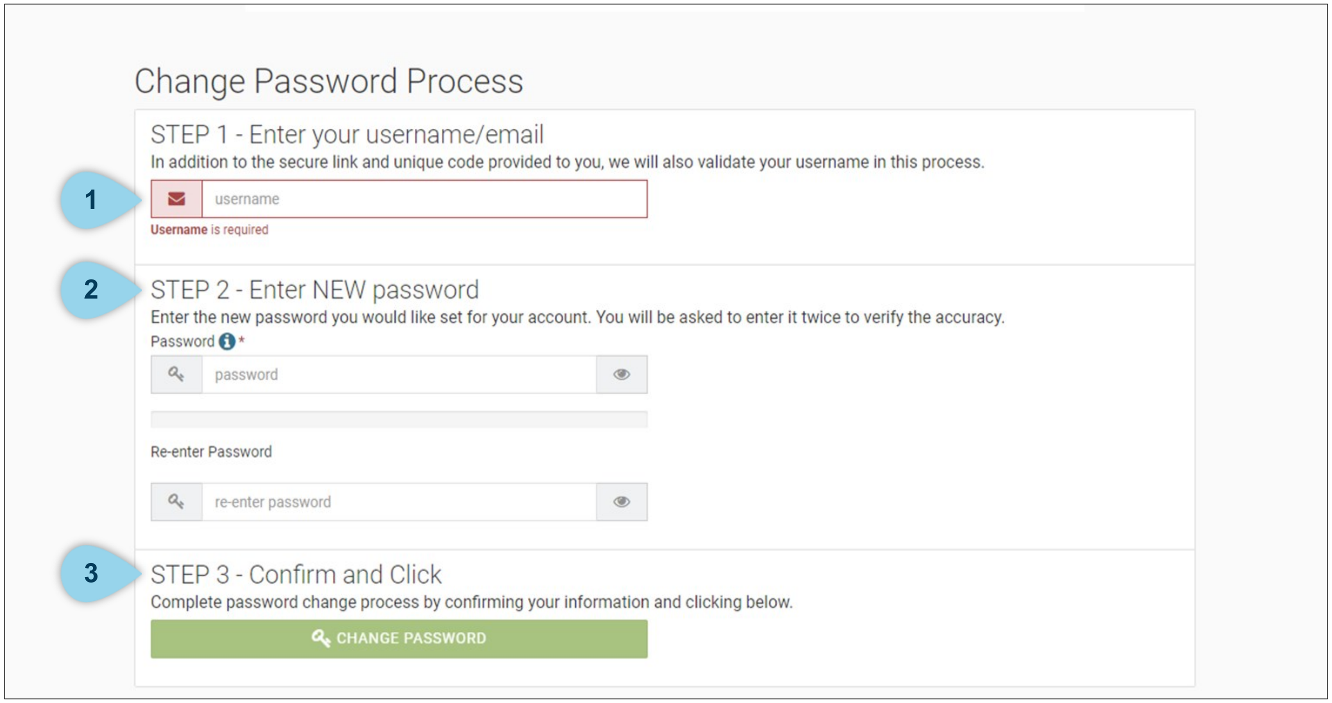
After clicking the link above to change your password, this link should NOT be subsequently used to login to the application. If you wish to login to the application at a later time please use:

http://ebcinc.evolutionadvancedhr.com/Secure/Home.aspx 3

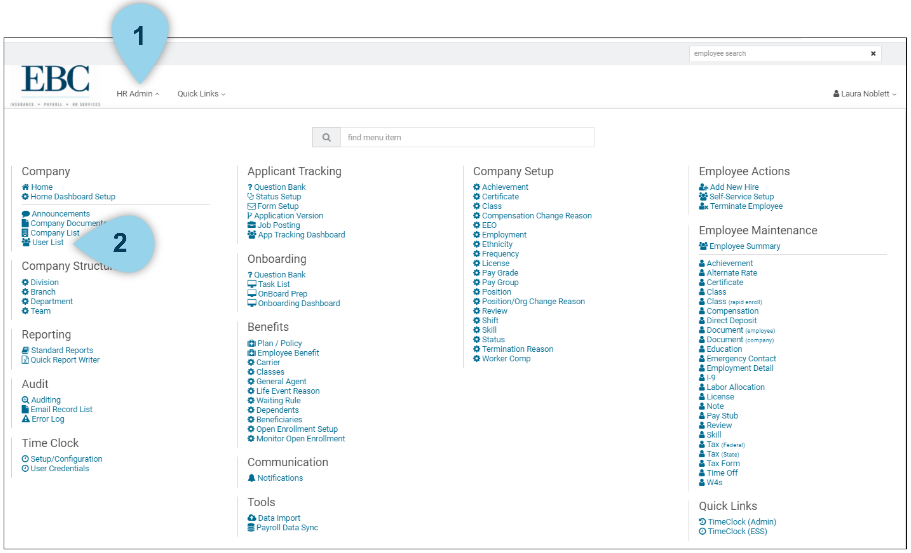
Password Setup

Once you click the change password link found in the welcome email, a webpage will open with the Change Password Process page below.

1. Enter the email address as shown in the welcome email as the username.
2. Set up a password and re-key to confirm.
3. Click the CHANGE PASSWORD button to submit.

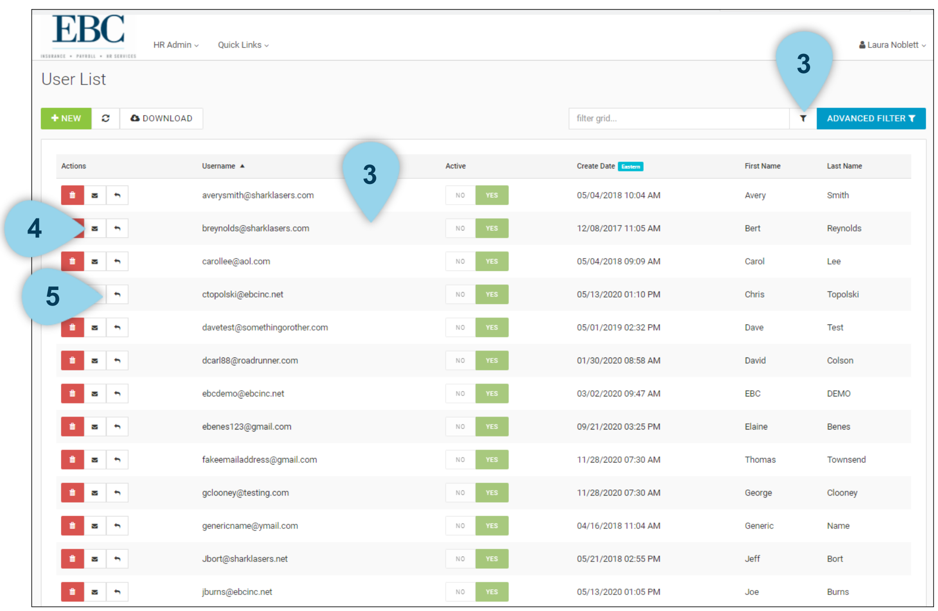


Password Reset



Before resetting a password, you need to know if the employee received the Welcome Email and went through the process of setting up their initial password. If the answer to that is no, resend the Welcome Email. If the answer is yes, then send a Password Reset email:

1. Go to HR Admin screen.
2. Under Company, click on User List.



3. Scroll through the employee list or enter the employee name or email address in the Filter Grid window.
4. Click the middle icon to send a new Welcome Email to the employee.
5. Click the back arrow icon to send a Password Reset email to the employee.

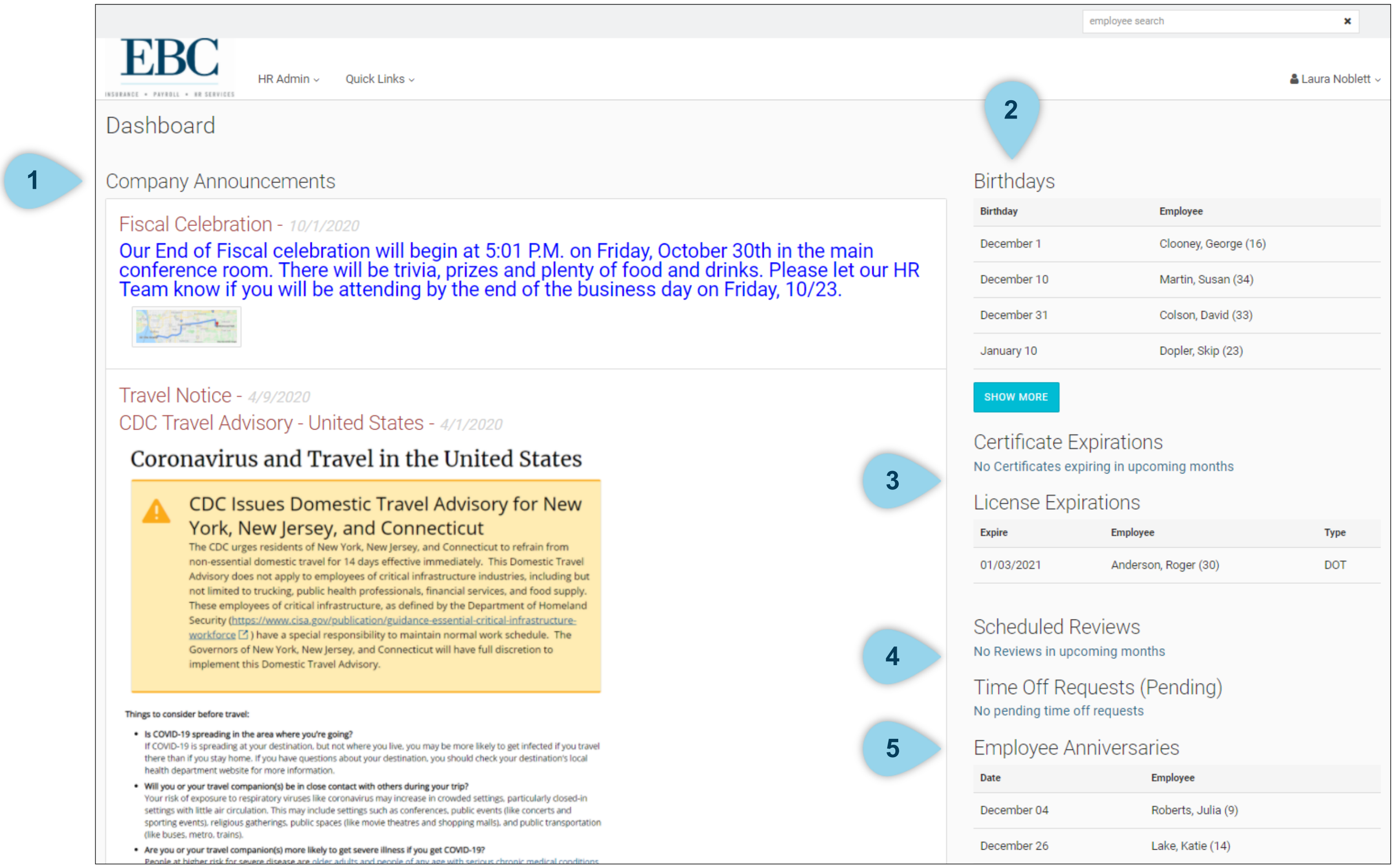
Basic Navigation

This section reviews the Advanced HR Dashboard and some of the basic components within.

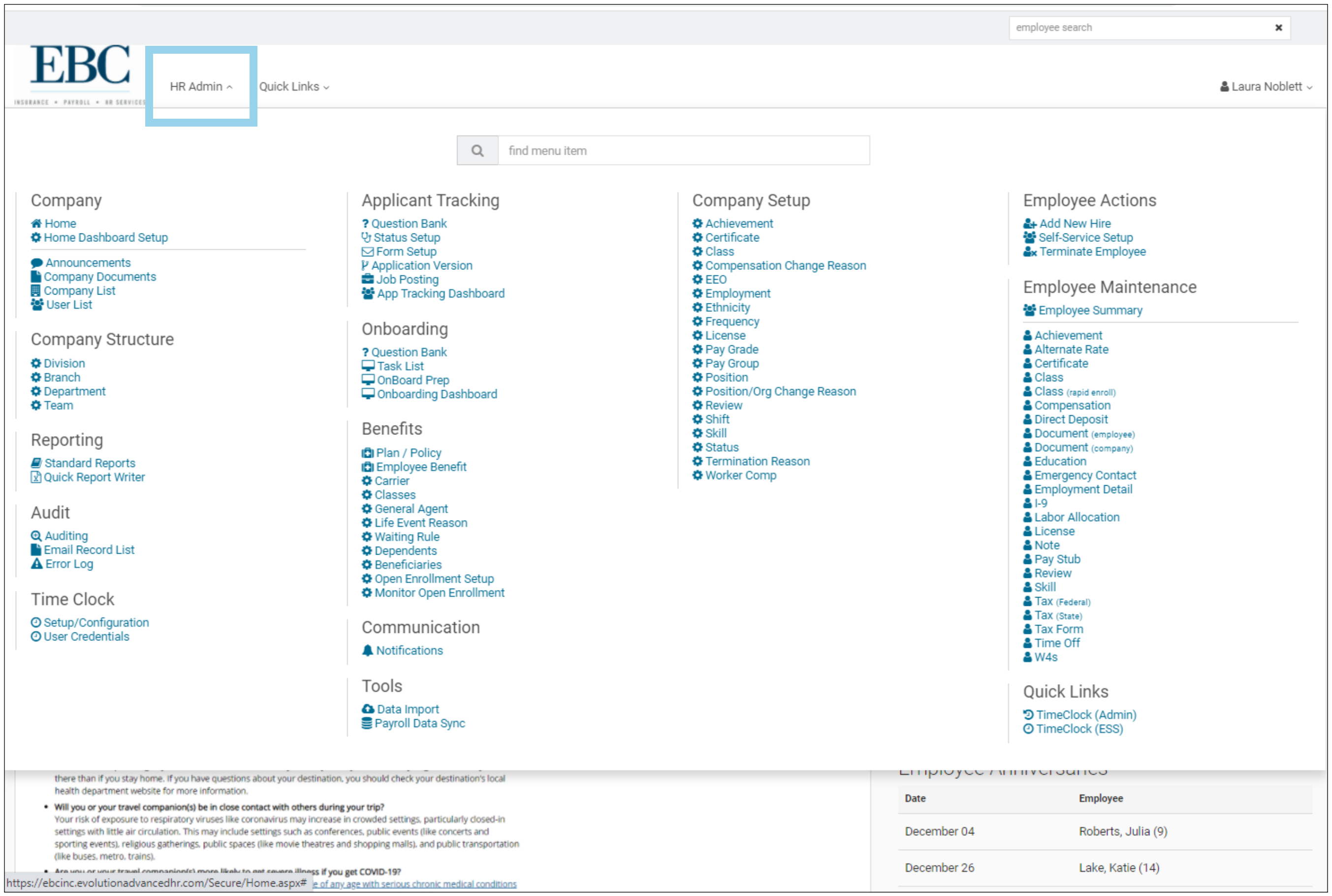
Dashboard Overview

Each time you log into Advanced HR, you will be directed to the Dashboard. The dashboard includes the following:

1. Company announcements.
2. Upcoming birthdays.
3. Certificate and licenses that are soon to expire.
4. Scheduling and time off review.
5. Upcoming employee anniversaries.

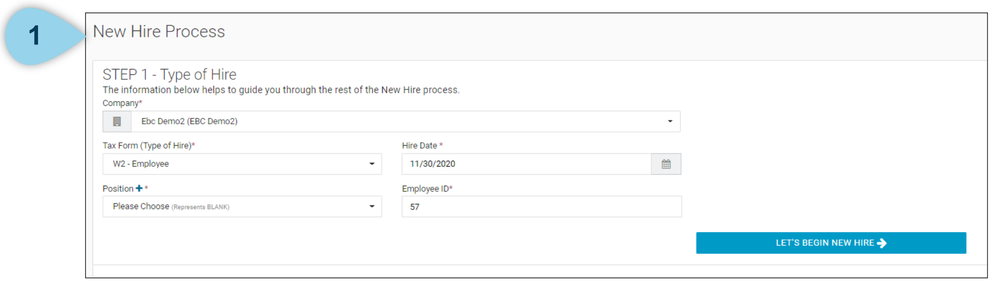


Click on HR Admin to display a full page of action items to complete your tasks.

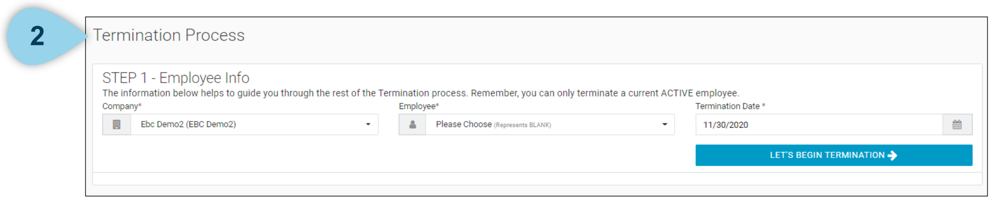


Dashboard Overview

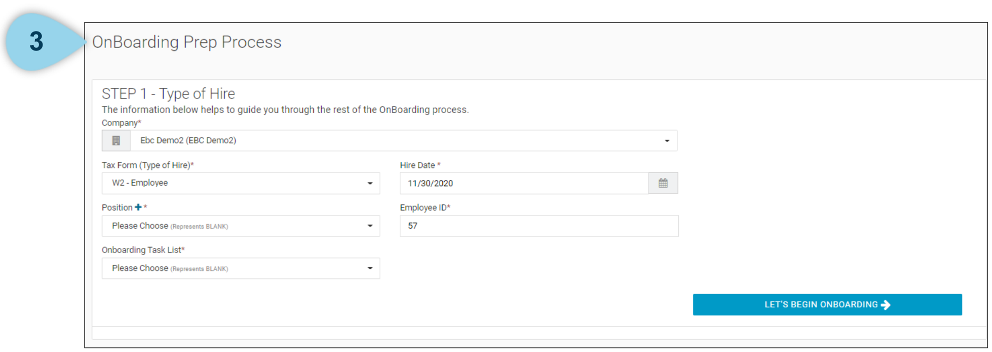
Click on Quick Links to access the following components:



1. **Add New Hire**: Use this feature to manually add a new hire if not using Onboard Prep. Enter in all necessary new employee details, then click LET'S BEGIN ONBOARDING. Once complete, any additional information can be entered under Employee Maintenance (e.g. Direct Deposit).

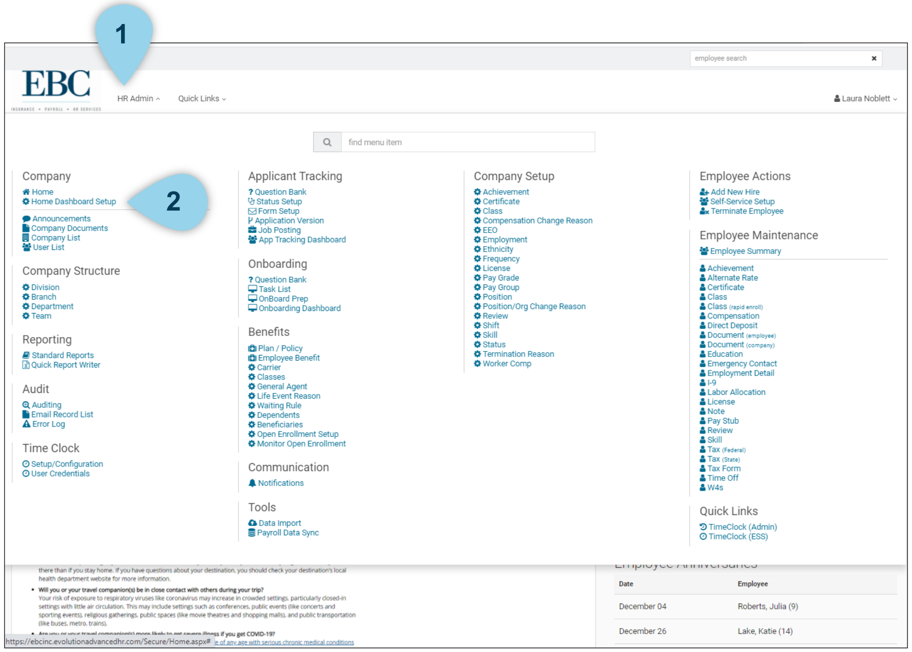


2. **Terminate Employee**: Select the employee then enter effective date, term reason, eligible for rehire, and comments as needed.



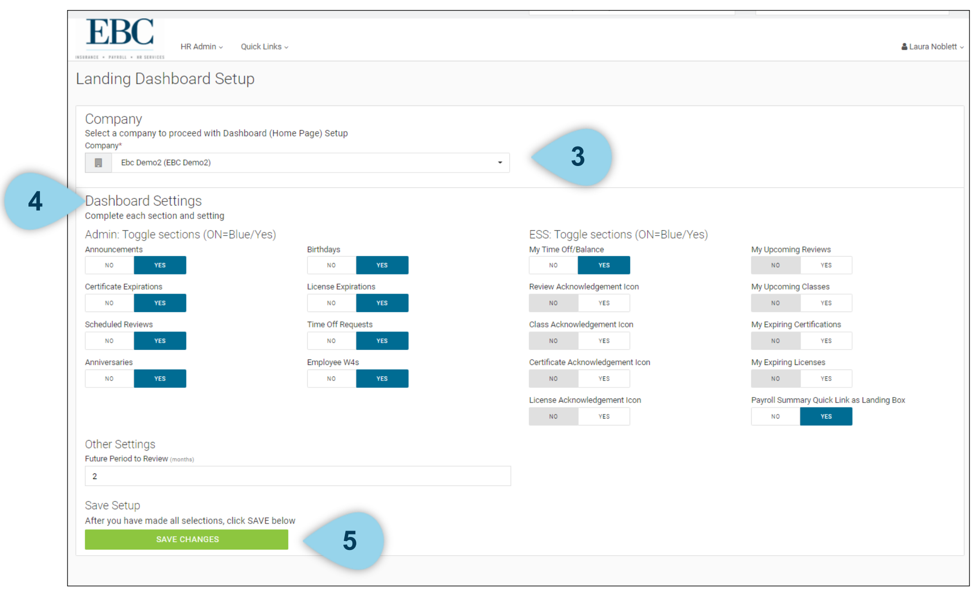
3. **Onboard Prep**: Use this feature to enter basic job details, such as position and hire date, and send an email link to the new employee to complete Onboard Task List details.

Setting Up Your View



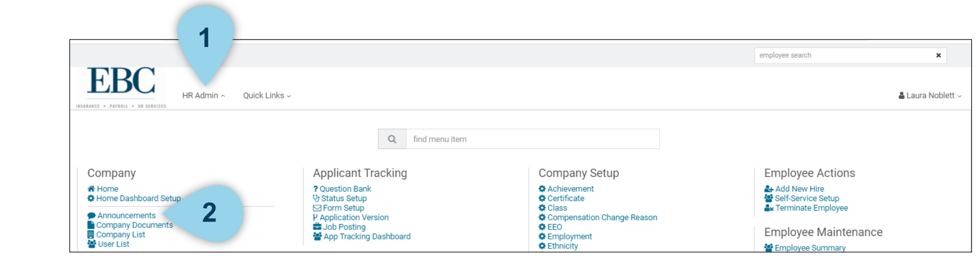
With Advanced HR, you can customize your Dashboard. To do this,

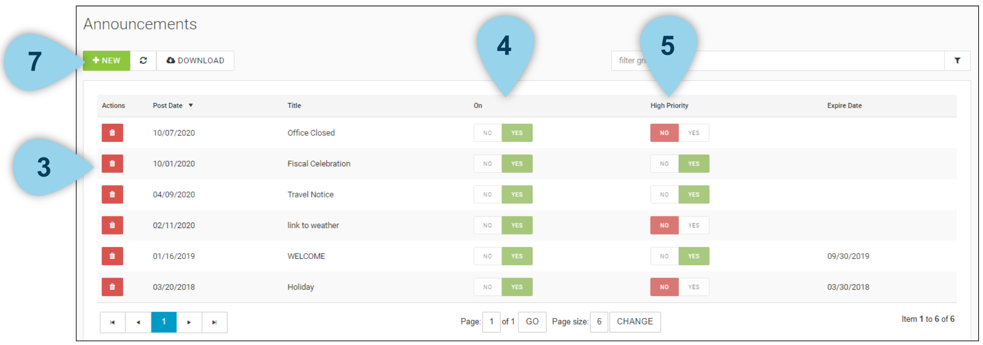
1. Click on HR Admin.
2. Under Company, click Home Dashboard Setup.

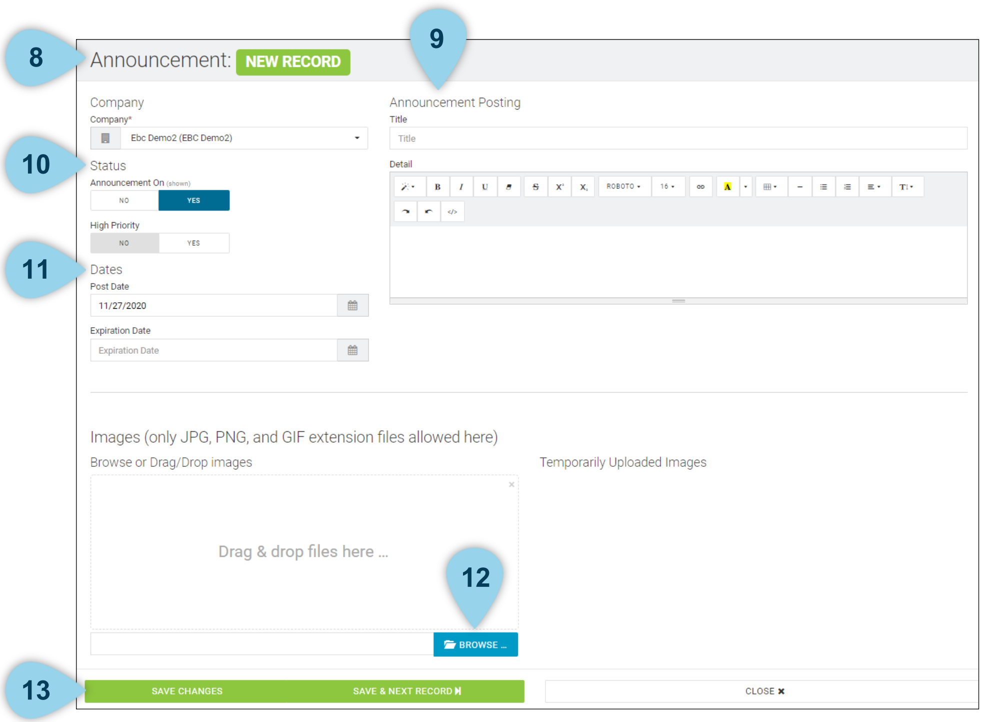


3. If you have access to more than one company, select the company before making any changes.
4. Under Dashboard Settings, switch the Admin Toggle options and ESS Toggle options to Yes if you want that option displayed or No if you do not want that option displayed on your Dashboard.
5. Press the SAVE CHANGES button to save your new setup.

Posting Announcements





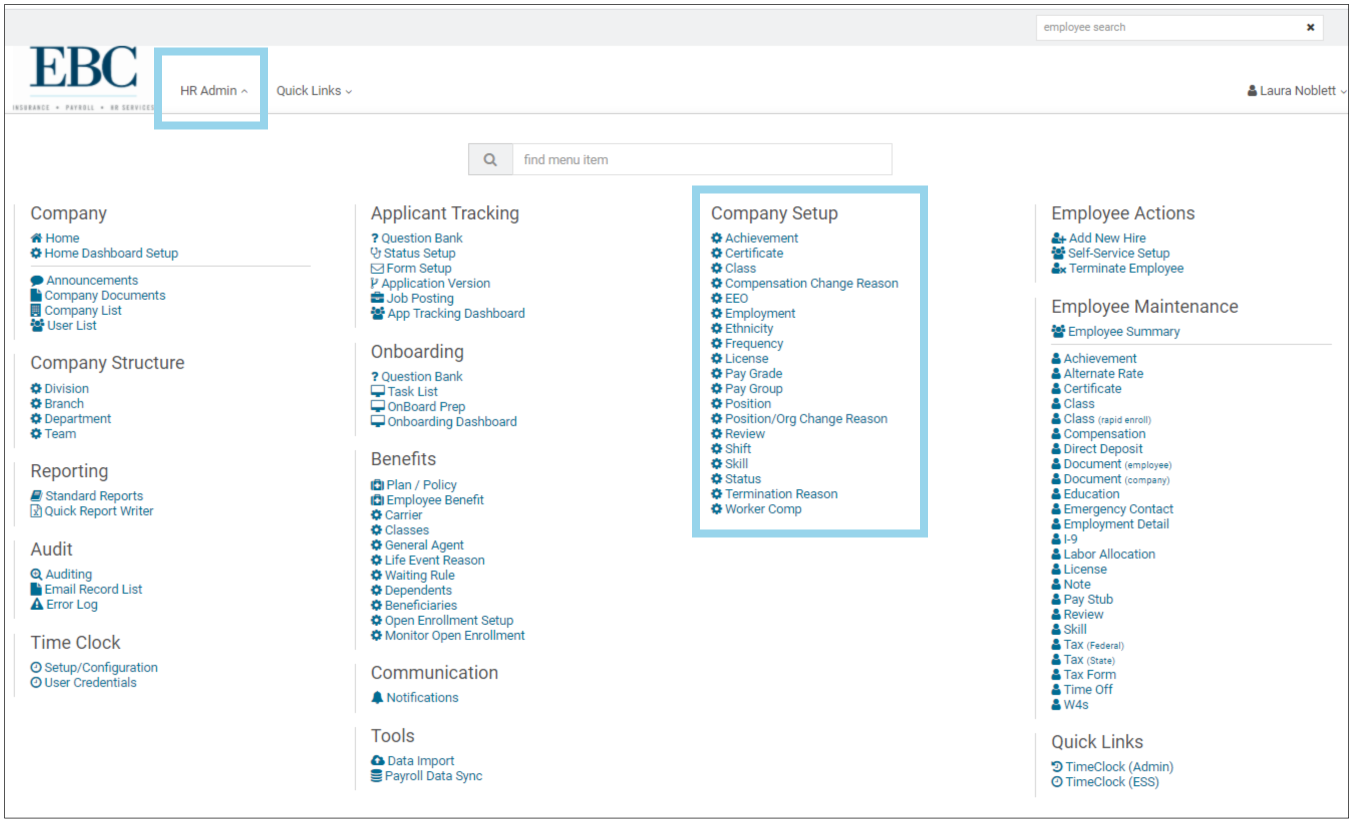


To post an announcement,

1. Click on HR Admin.
2. Under Company, click Announcements.
3. Click the trash icon to delete an announcement.
4. Toggle between Yes and No to turn the announcement on and off.
5. If you announcement is high priority, switch the toggle to YES to push the announcement to the top of the dash-board.
6. Click on the announcement to view and edit the details (i.e. text, delivery and expiration dates, images).
7. Click the NEW button to add a new announcement.
8. The new announcement page will display - this has the same layout as #6 above (view and edit existing an-nouncement).
9. Enter title and the announcement details in the An-nouncement Posting section.
10. Select status.
11. Enter dates.
12. Enter an image or file.
13. Choose a button to save and close, save and view the next announcement, or close without saving. You can save reoccurring announcements to be used again. Saved announcements can be edited to change details within (e.g. open enrollment notice).

Company Setup

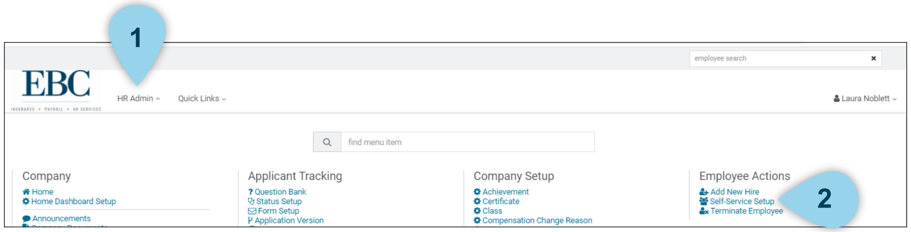
Company Setup offers features to track selected fields. This section can be accessed by clicking on HR Admin. Use it to view various tables for tracking details such as Certifications, Licenses, Performance Reviews, Skills, etc.



Employee Actions

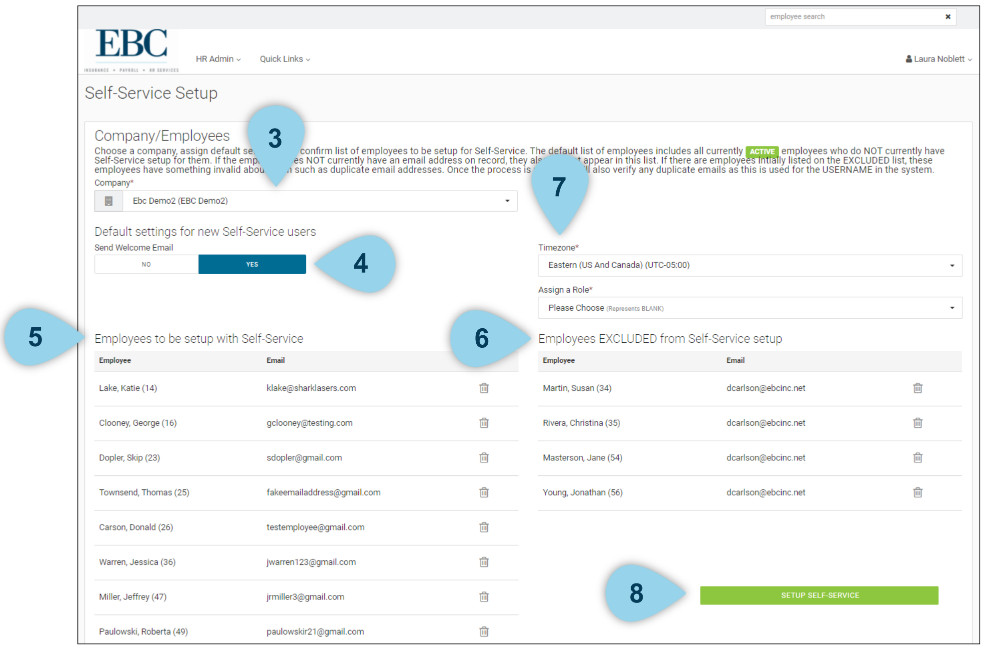
This section reviews how to set up employee self-service.

Self-Service Setup

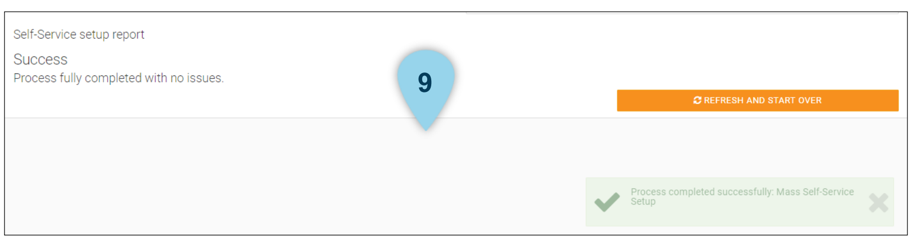


To set up employee self-service,

1. Click on HR Admin.
2. Under Employee Actions, click Self-Service Setup.



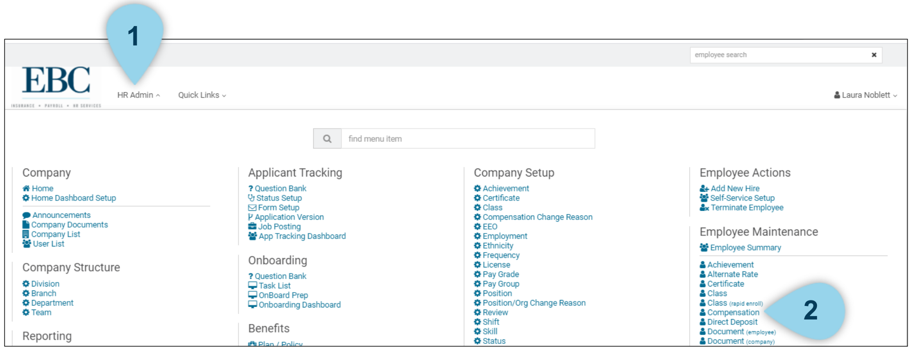
3. Choose a company from the drop down list.
4. Toggle Yes or No to assign default settings.
5. Confirm the list of employees to be setup for Self-Service. The default list of employees includes all currently **active** employees who do NOT currently have Self-Service setup for them. If the employee does NOT currently have an email address on record, they will not appear in this list.
6. 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.
7. Verify the time zone, then assign a role from the drop down options. It's critical to add instruction to assign Base User Role (ONLY) to regular employees. Base Admin will allow user to see all content including rates for all employees, and Base Manager will allow the same for any employees who have the user listed as a Supervisor in their record.
8. Click the SETUP SELF SERVICE button.
9. You will see a success message once the process is com-plete.

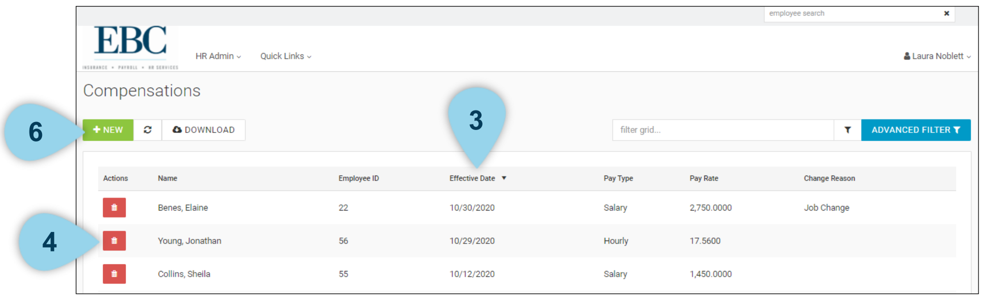


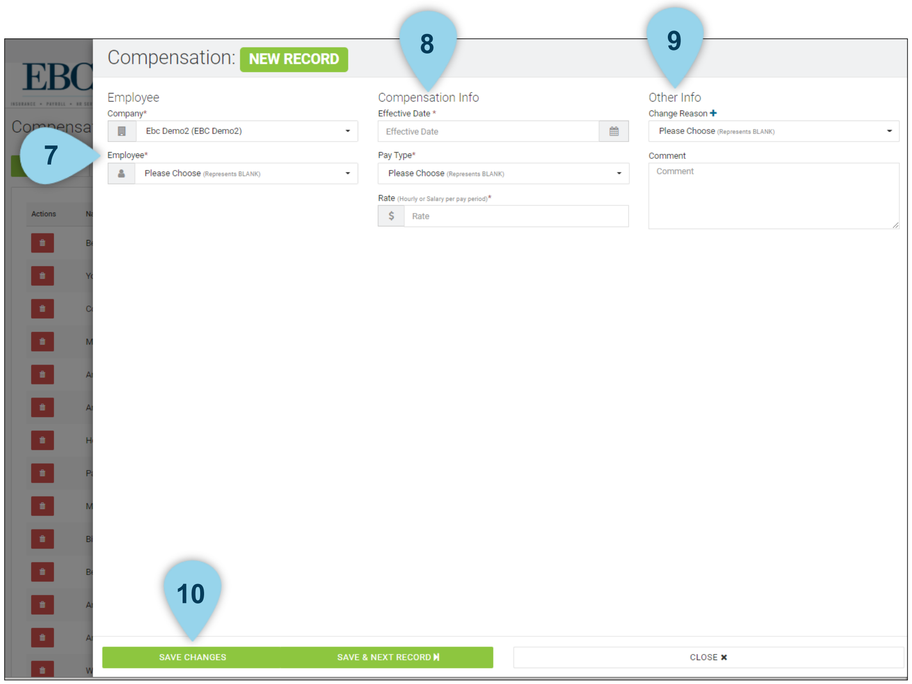
Employee Maintenance

This section reviews how to view and edit employee information.

Compensation



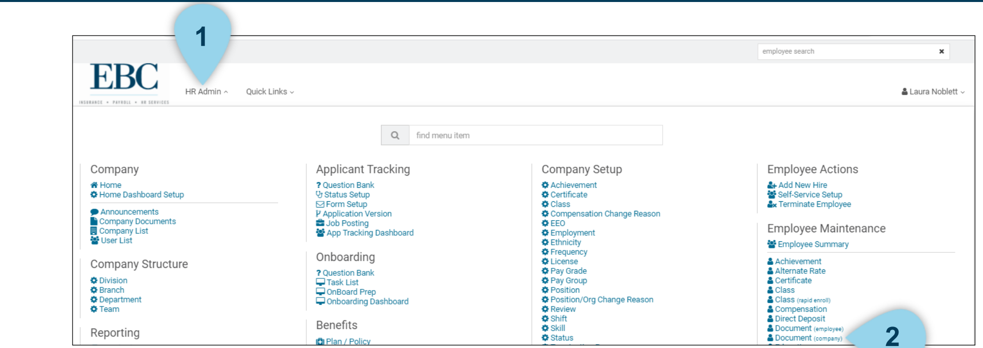


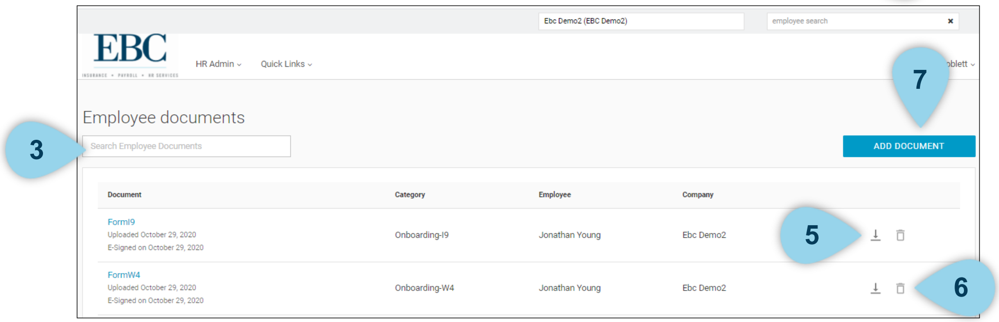


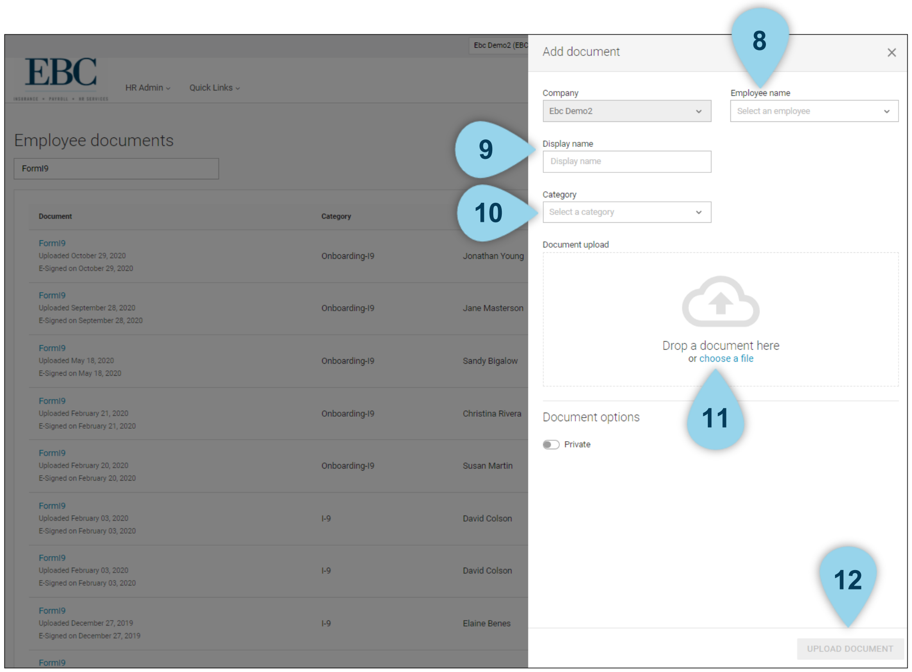
To review and employee compensation,

1. Click on HR Admin.
2. Under Employee Maintenance, click Compensation.
3. The list will automatically be filtered by Effective Date of recent changes.
4. Click on the trash can icon to delete a compensation change. This should only be done if the entire entry is incorrect. The HRIS tracks history of changes which should remain intact in almost all instances. If a rate needs to be fixed, the user can open the record and change it then add a reason and or notes as needed.
5. Click on a row to review or edit details of the compensation change.
6. Click the NEW button to add a new compensation change.
7. Choose an employee from the Employee drop down list.
8. Enter Compensation Info (effective date, pay type, and pay rate).
9. Update Other Info as needed.
10. Choose a save option.

Employee Documents



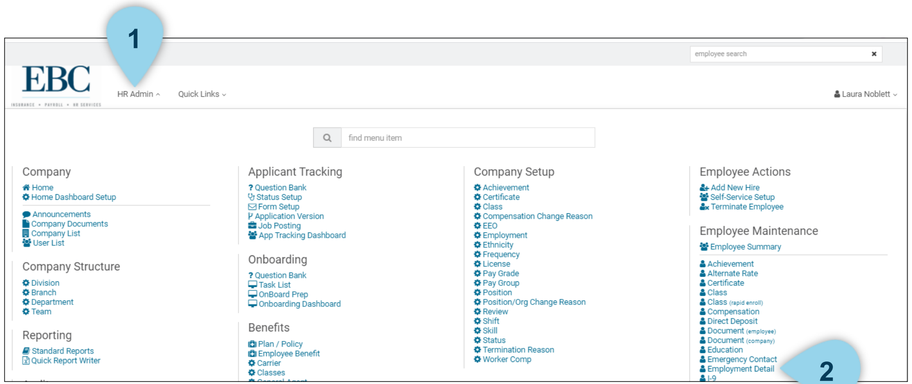


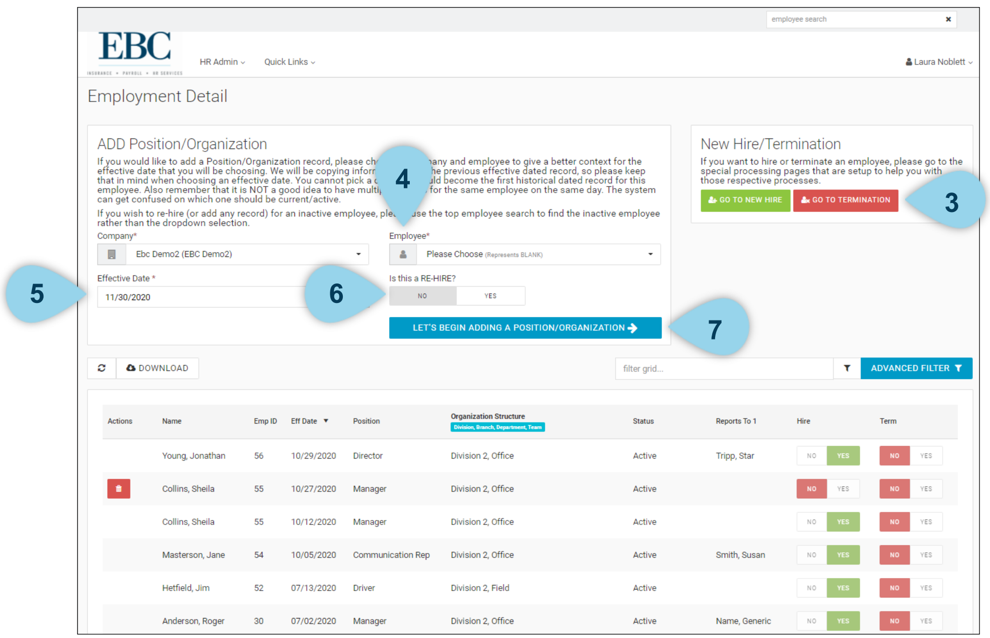


To review and upload employee documents,

1. Click on HR Admin.
2. Under Employee Maintenance, click Document (employee).
3. Use the search box to locate a specific document. Type the document name to find all added documents of that type or search by employee name to find all documents added for a specific employee.
4. Click on the document title to open and view.
5. Click the download icon to download and save the document.
6. Click the trash can icon to delete a document.
7. Click the ADD DOCUMENT button to upload a new document for an employee.
8. Select an employee form the Employee Name drop down list.
9. Enter a Display name - this will appear as the document title in the Employee documents list.
10. Select a category from the drop down list.
11. Choose a document to upload.
12. Click the UPLOAD DOCUMENT button once you are done.

Employment Detail

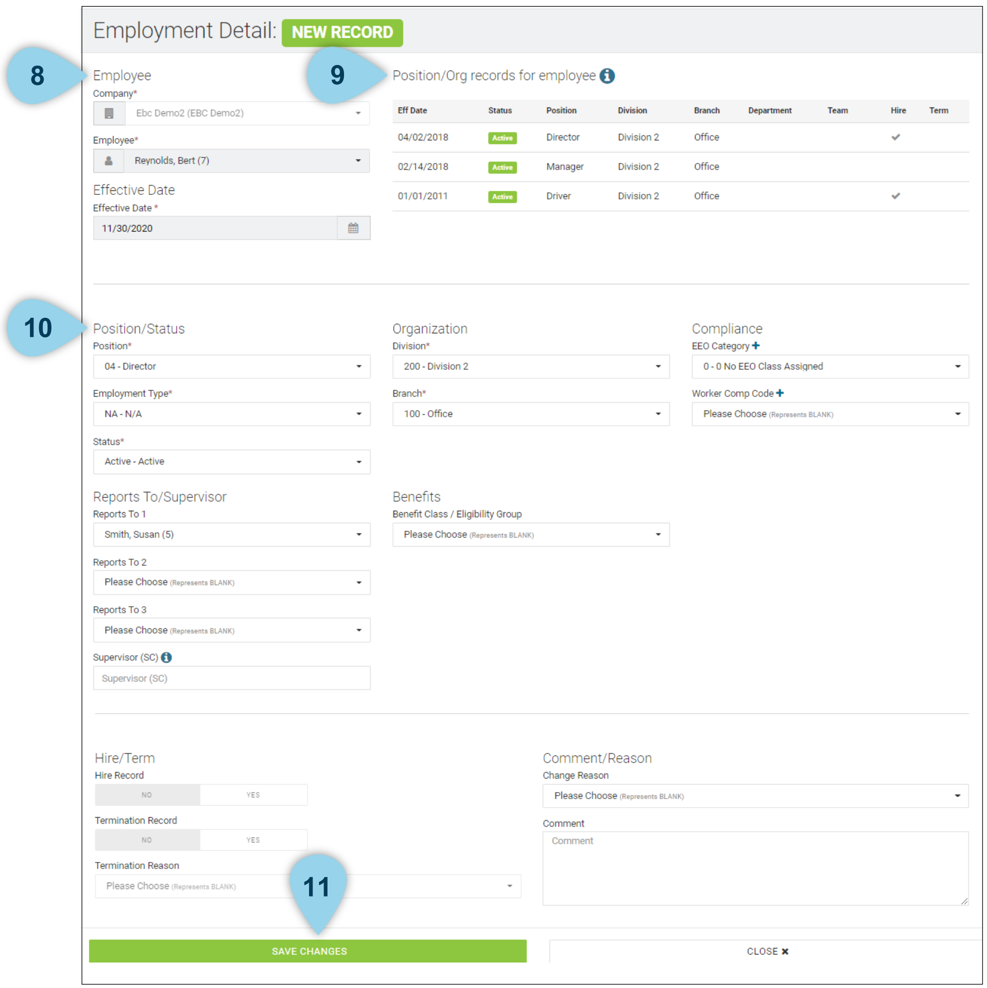




The Employment Detail section houses job detail history for position, employment type, location, supervisor, etc. All employment and job changes must be completed through this feature. To access Employment Detail,

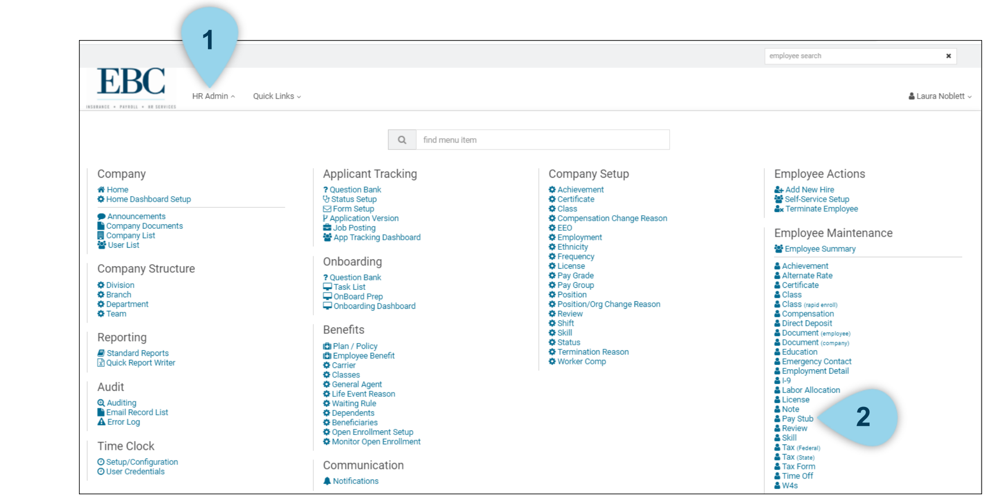
1. Click on HR Admin.
2. Under Employee Maintenance, click Employment Detail.
3. To start the termination process (also accessed through the Quick Links reviewed on page 11), click the GO TO TERMINATION button.
4. To add a Position/Organization record, choose a company and employee.
5. Chose the effective date.
6. If you wish to re-hire (or add any record) for an inactive employee, use the top employee search to find the inactive employee rather than the dropdown selection.
7. Click the button LET'S BEGIN ADDING A POSITION/ORGANIZATION.

Employment Detail



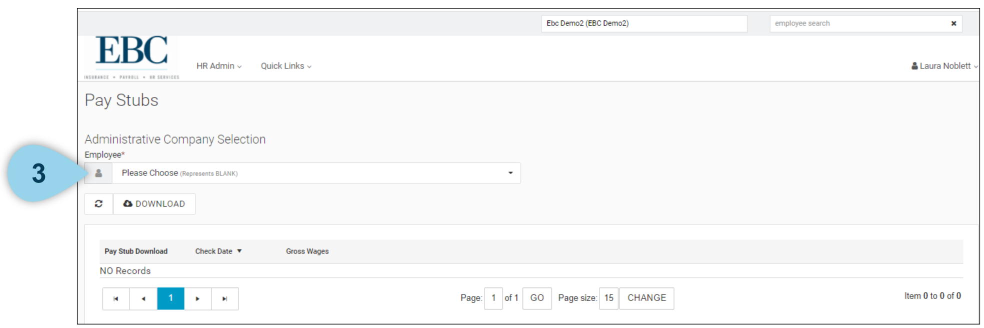
8. Information in the Employee and Effective Date sections are not able to be edited here. These selections need to be made on the previous screen.
9. Review previous positions for the employee in the Position/ Org records for employee section.
10. Make selections for the remaining fields:
    - Position/Status
    - Organization
    - Compliance
    - Reports To/Supervisor
    - Benefits
11. Click the SAVE CHANGES button to save the position up-date.

Pay Stub

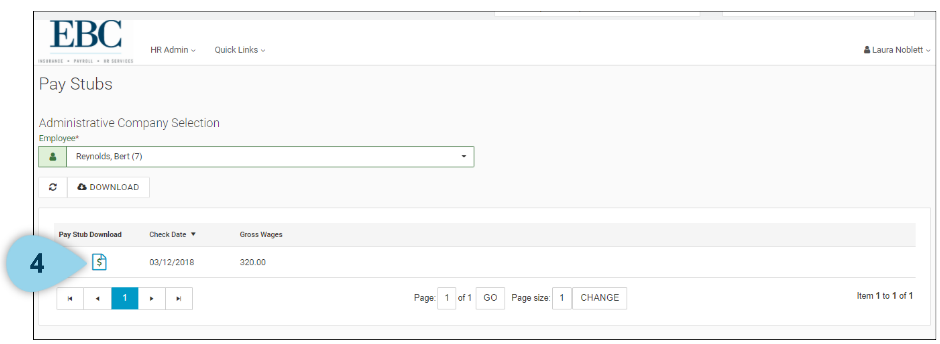


To review and download an employee pay stub,

1. Click on HR Admin.
2. Under Employee Maintenance, click Pay Stub.



3. Choose an employee from the Employee drop down list.

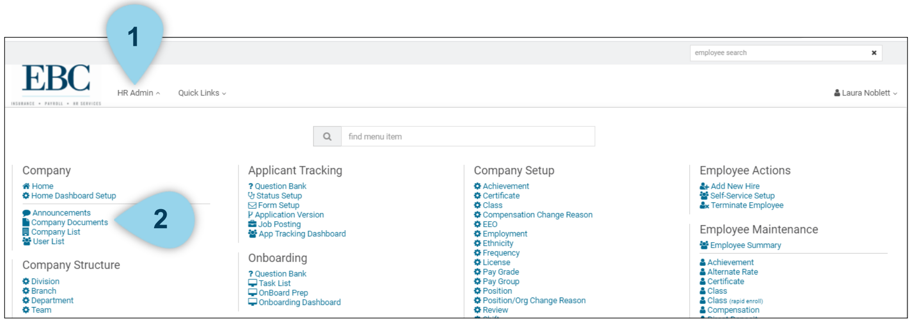


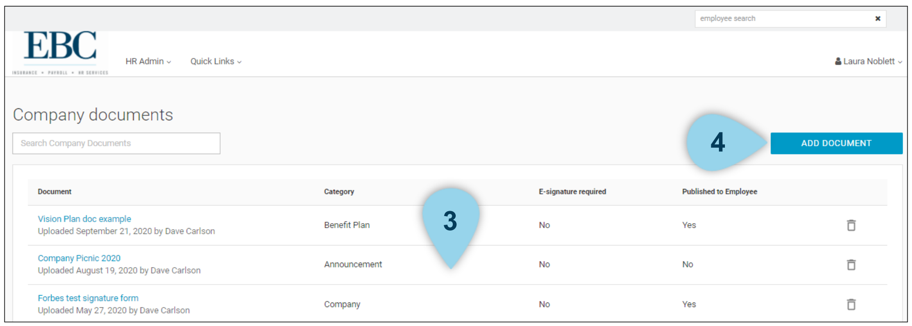
4. Pay stubs for the selected employee will be listed. Click the pay stub icon to download and view the pay stub.

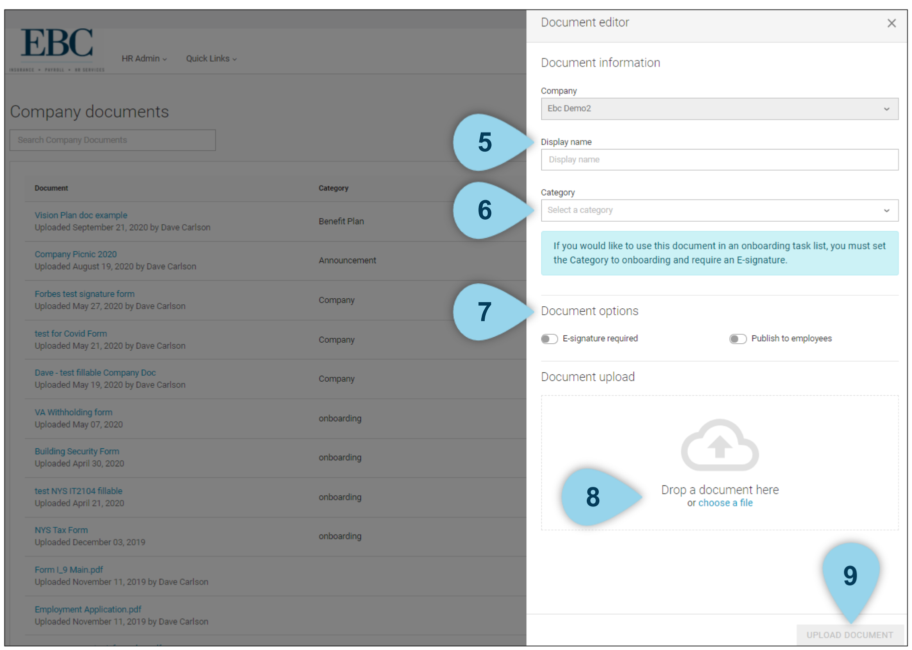
Company

This section reviews how to view and add company documents.

Company Documents







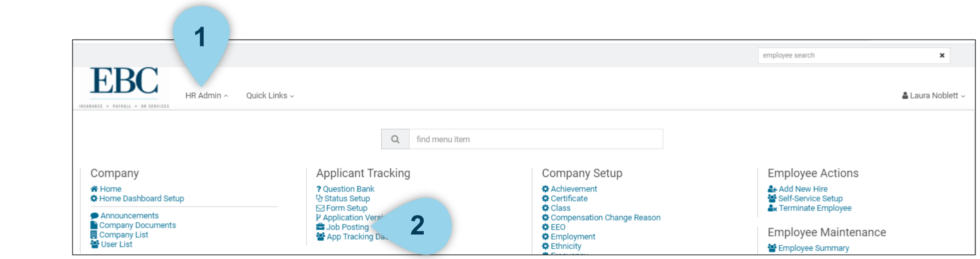
To add a new company document,

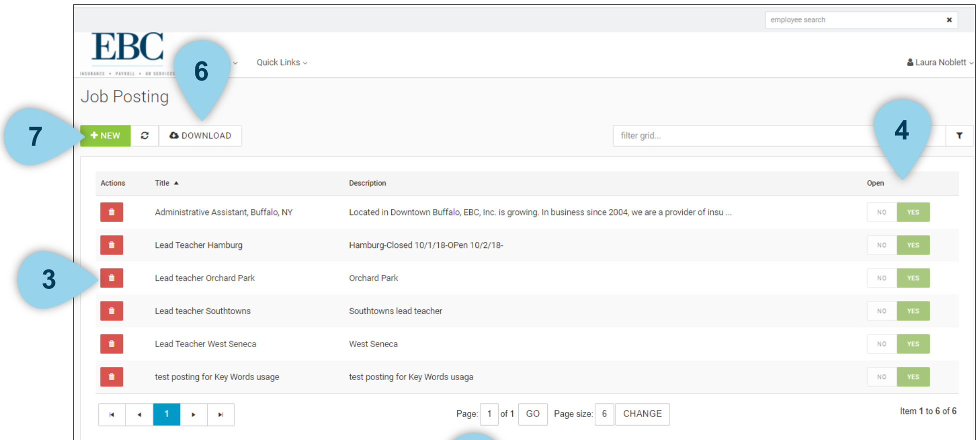
1. Click on HR Admin.
2. Under Company, click Company Documents.
3. Click on a document line to view and update details (i.e. name, category, publish options, e-signature, etc).
4. To add a new document click the ADD DOCUMENT button.
5. Enter the document Display name.
6. Select a category (e.g. onboarding)
7. Toggle the Document options to choose if E-signature will be required and if this document will be published to employees.
8. Choose a file to upload.
9. Once your settings are complete, click the UPLOAD DOCUMENT button.

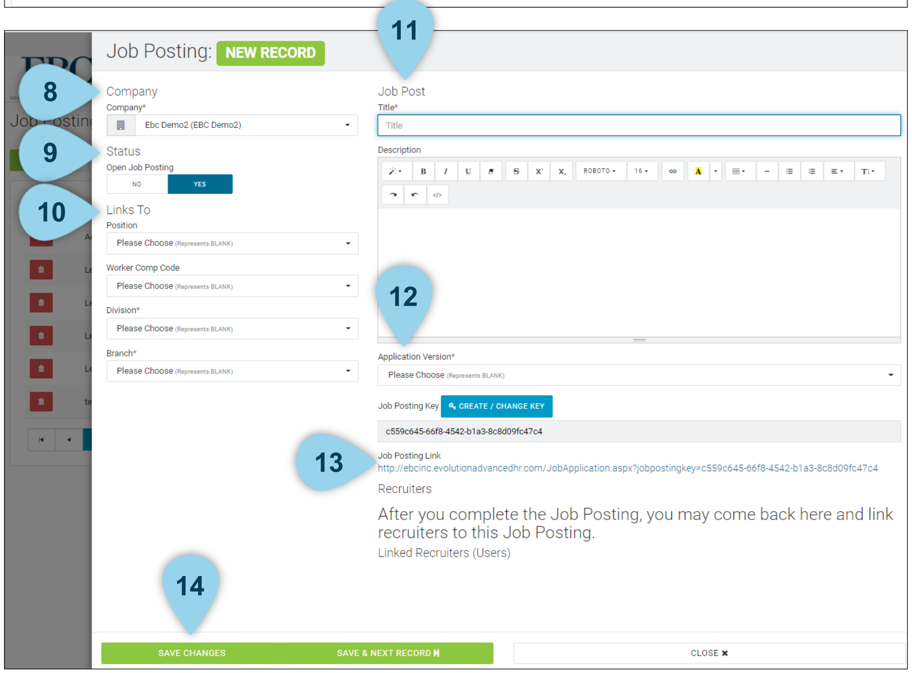
Applicant Tracking

This section reviews how to make a job posting and track applicants through the process.

Post a Job



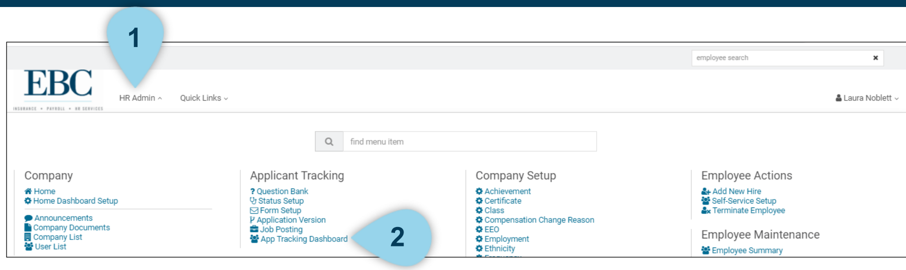


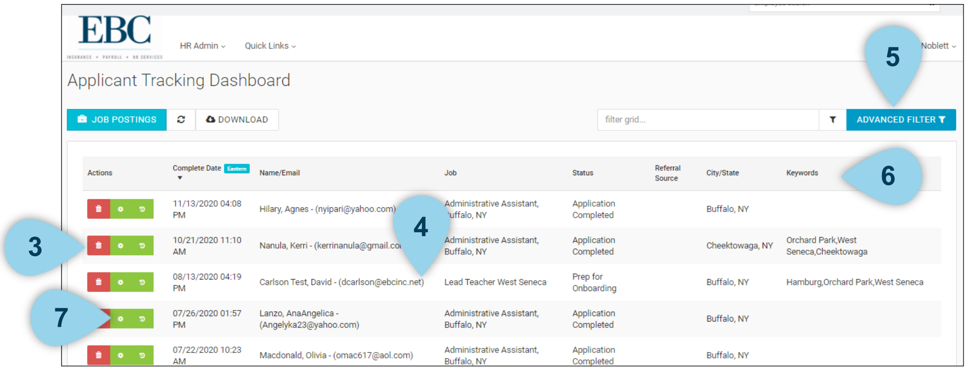


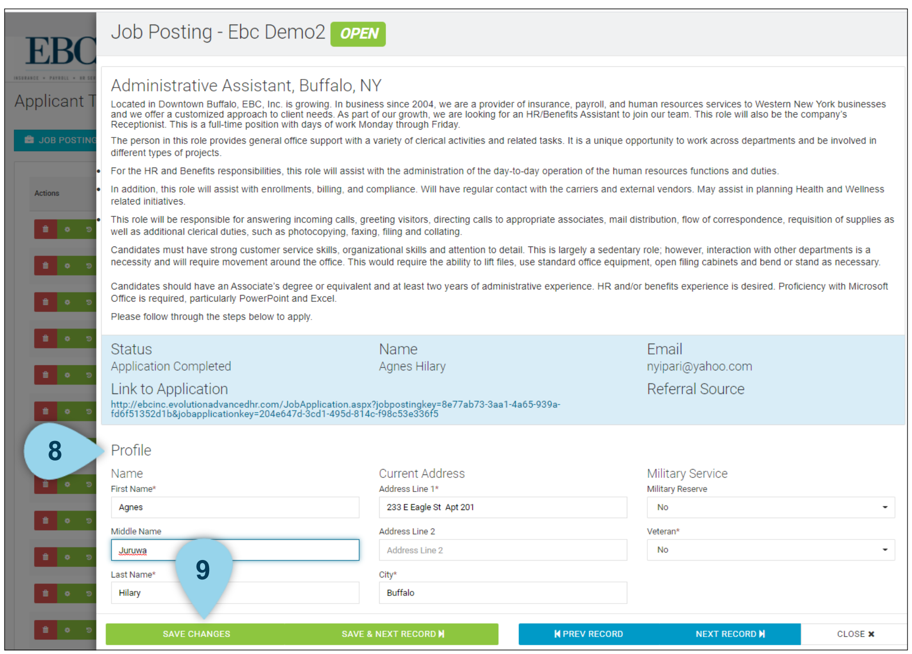
To post a job,

1. Click on HR Admin.
2. Under Applicant Tracking, click Job Posting.
3. To delete a posting, click the trash can icon. This should only be done if the job posting will never be used again.
4. Toggle the Open option rom YES and NO to turn the posting on and off.
5. Click on a job posting to review and edit details.
6. Click the DOWNLOAD button to download a job posting.
7. Click the NEW button to start a new job posting.
8. Select the company.
9. Toggle the Status to YES or NO to turn the posting on or off.
10. Choose options from the drop down lists in the Links To section.
11. Give your job posting a title and enter a description for the position.
12. Choose an Application Version.
13. A unique link will be created within each separate job posting screen. This can be copied and pasted into the company website, careers page, and/or any job boards where the job needs to be advertised. When an appli-cant clicks on the link, they will be prompted to complete all required information and questions, as well as upload a resume or other documents. Once complete, it will im-mediately update the dashboard.
14. Click SAVE CHANGES to save your job posting.

Applicant Tracking Dashboard



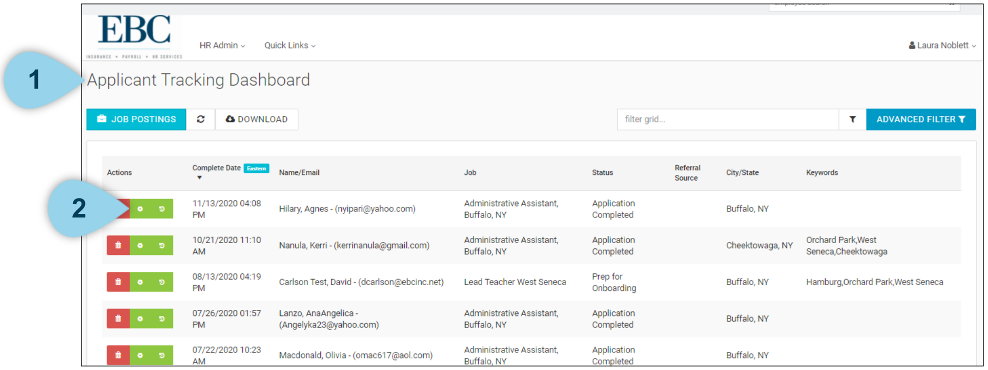




To track the status of a job posting,

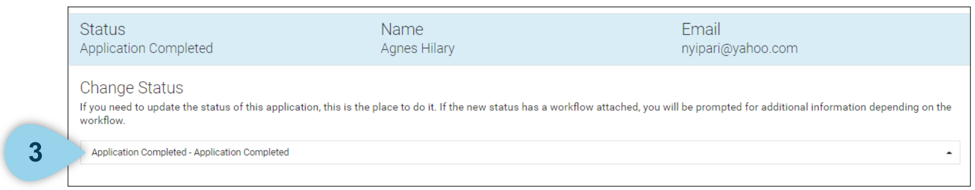
1. Click on HR Admin.
2. Under Applicant Tracking, click App Tracking Dashboard.
3. To delete an applicant, click the trash can icon.
4. To review history, notes, and documents about the applicant, click on the job posting.
5. Results can be filtered based on any details shown in the line items (e.g. Job Title, Location, Key Words).
6. Sort the results by clicking on any of the column headers.
7. Click on the middle action icon for workflows such as: schedule interview, application reviewed, reject application, develop or extend offer, onboard prep, etc. workflows will send a customizable email notification to included parties – e.g. applicant, hiring manager, HR Admin, etc.
8. Review and edit applicant information as needed.
9. Click the SAVE CHANGES button to save edits.

Extend an Offer

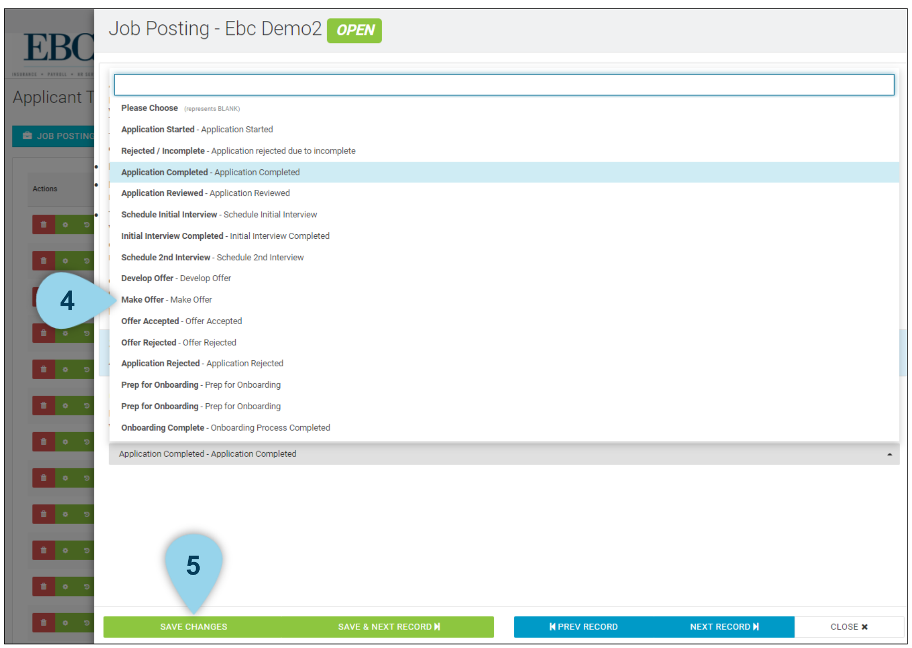


To extend an offer,

1. Open the Applicant Tracking Dashboard.
2. Locate the applicant and click on the settings icon in the Actions column.



3. Under the Change Status section, click on the drop down option.

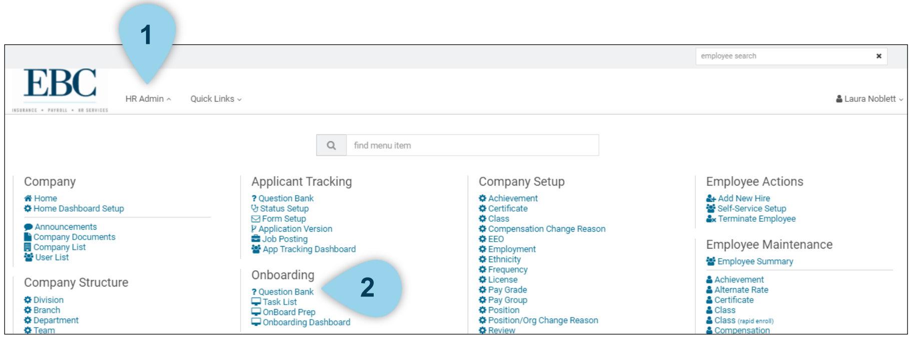


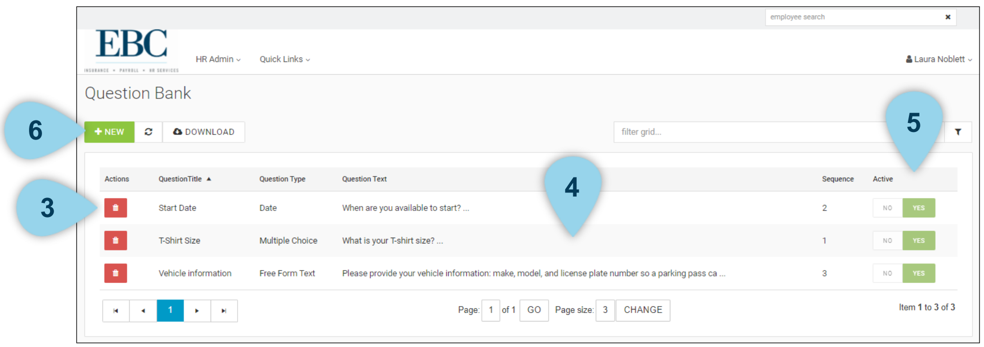
4. Select a Make an offer.
5. Click the button SAVE CHANGES.

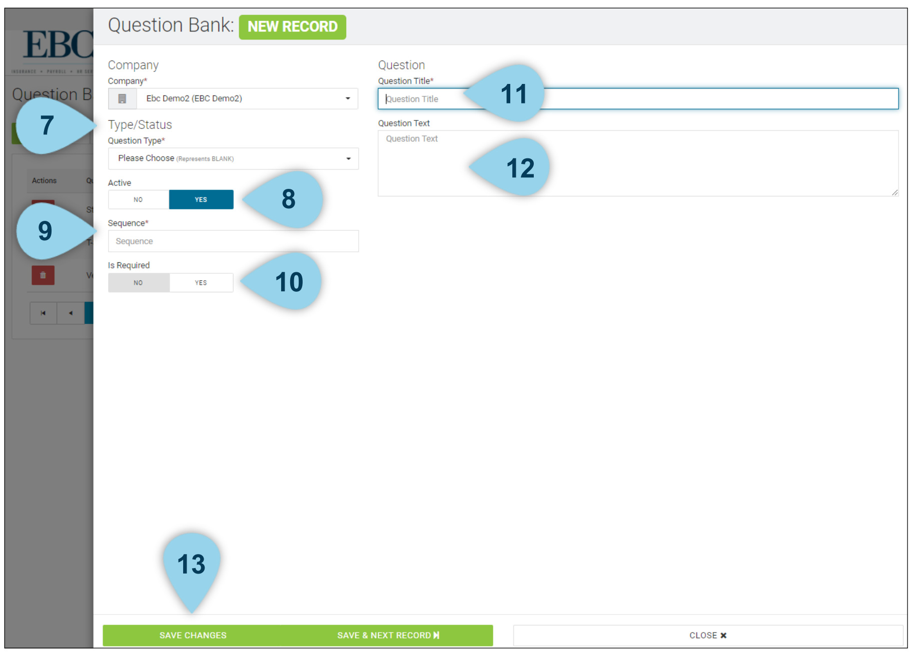
Onboarding

This section reviews how to onboard new employees.

Question Bank



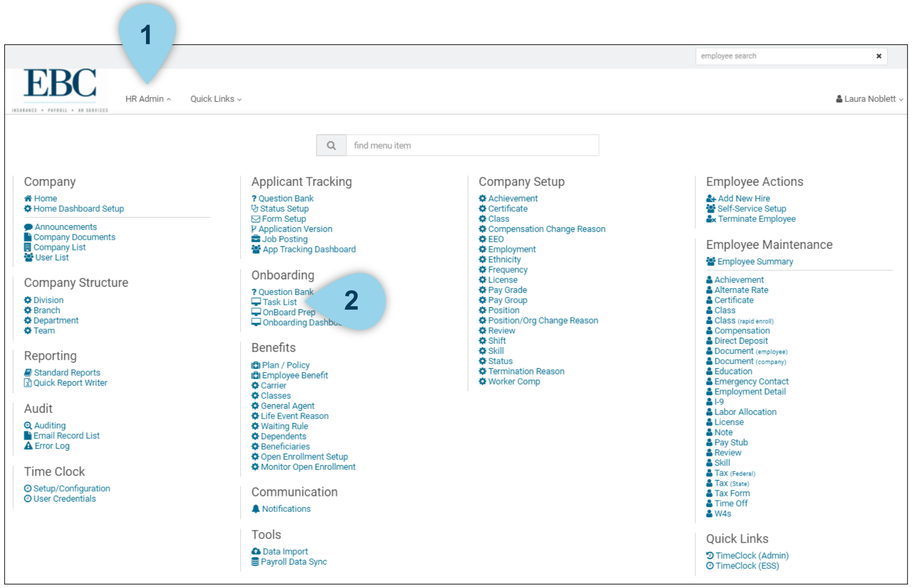




Use the Question Bank to create custom questions to ask on an onboarding task list (Task Lists will be reviewed next). To review or create a question bank,

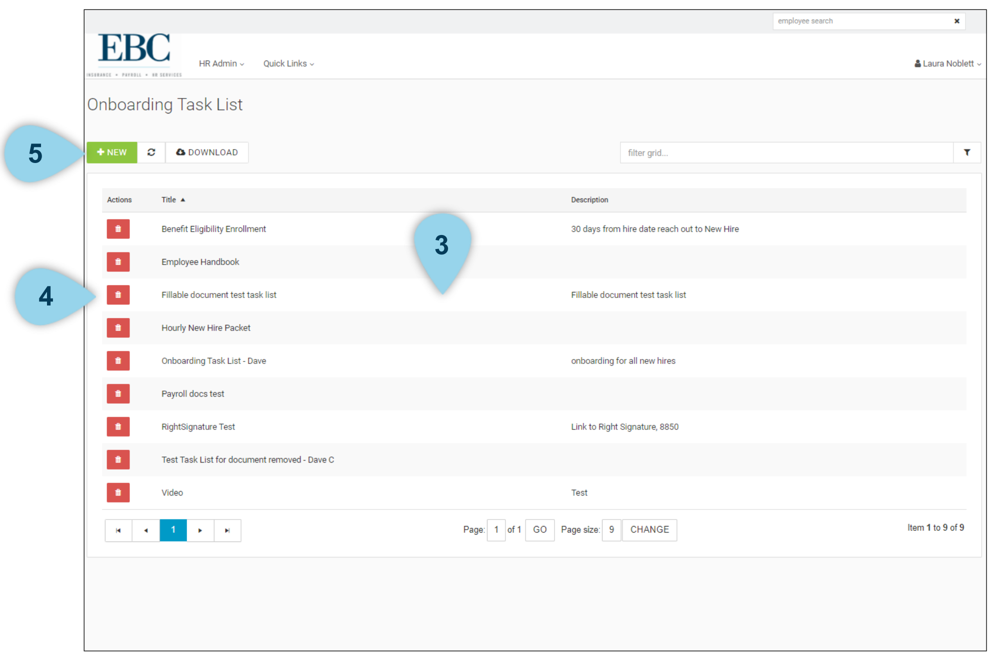
1. Click on HR Admin.
2. Under Onboarding, click Question Bank.
3. Click on the trash icon to delete a question.
4. Click on the question line to review and edit a question.
5. Toggle Active options between YES and NO to active or deactivate a question.
6. Click on the NEW button to create a new question.
7. Select the question Type/Status from the drop down list.
8. Toggle the Active option between YES and NO to activate or deactivate the question.
9. Enter a number in the Sequence box that will determine the order this question ill display.
10. Toggle the Is Required option between YES and NO to make the question required or not.
11. Enter a Question Title.
12. Enter the Question Text.
13. Click the SAVE CHANGES button.

Task List



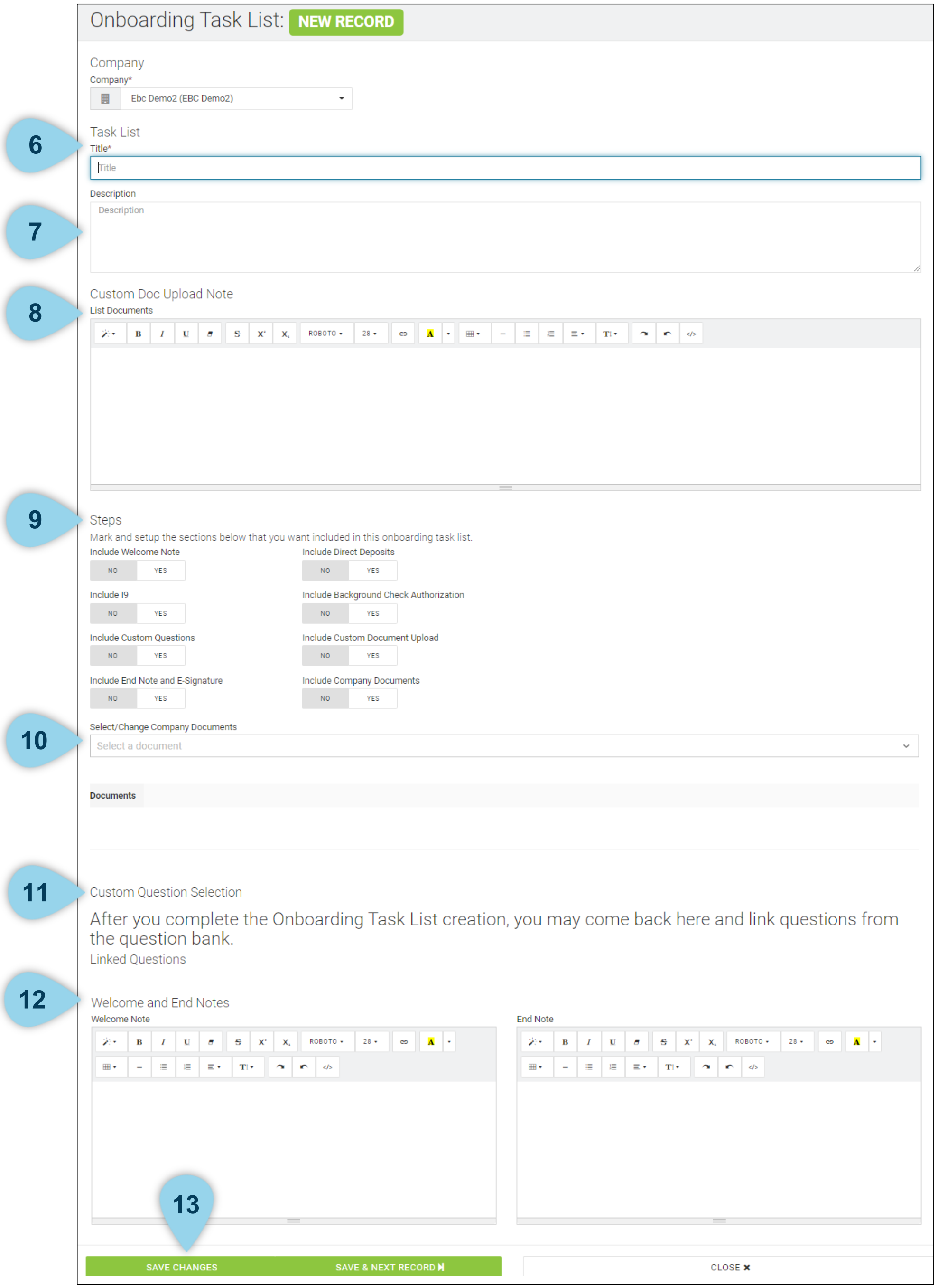
Set up a task list to include all details needed from a new employee. To access this feature,

1. Click on HR Admin.
2. Under Onboarding, click Task List.

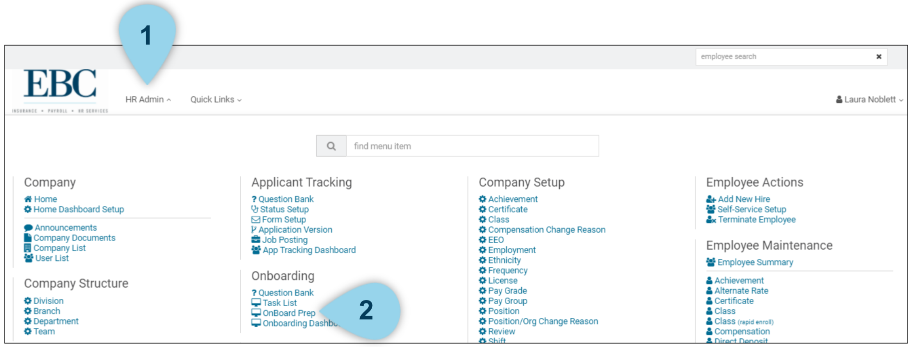


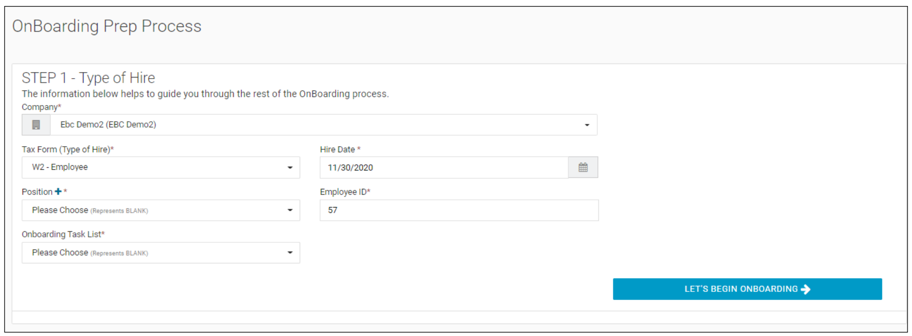
3. Click on a task list to review and edit details.
4. Click on the trash can icon to delete an existing task list.
5. Click on the NEW button to create a new task list.

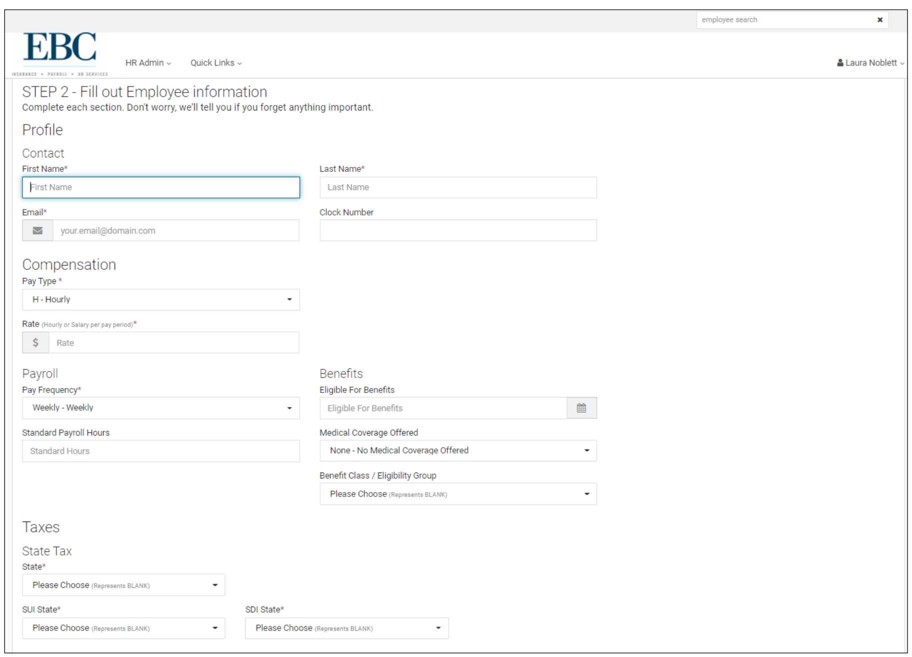
Task List



6. Give your task list a title.
7. Enter a description for the task list.
8. List documents in the Custom Doc Upload Note box.
9. In the Steps section, toggle between YES and NO to choose the sections you want to include.
10. Select any company documents to include.
11. Link custom questions from the question bank.
12. Enter Welcome and End notes.
13. Click the SAVE CHANGES button to finish creating the new task list.



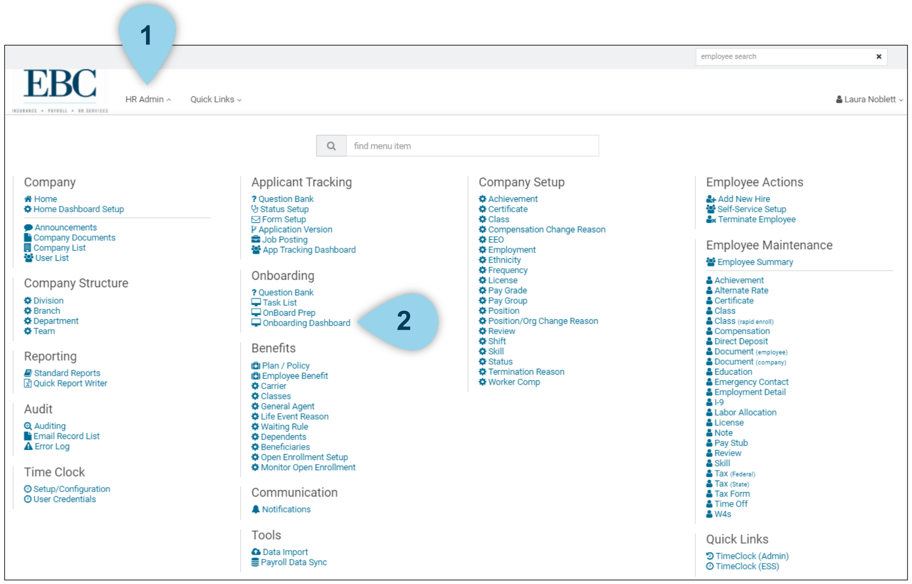




Use the Onboard Prep option to assign rate of pay, supervisor, location details. This will send a link to employee to complete everything paperless: I-9, W4, State Tax form, Direct Deposit, Emergency Contact, any company documents, etc. To access the Onboard Prep feature,

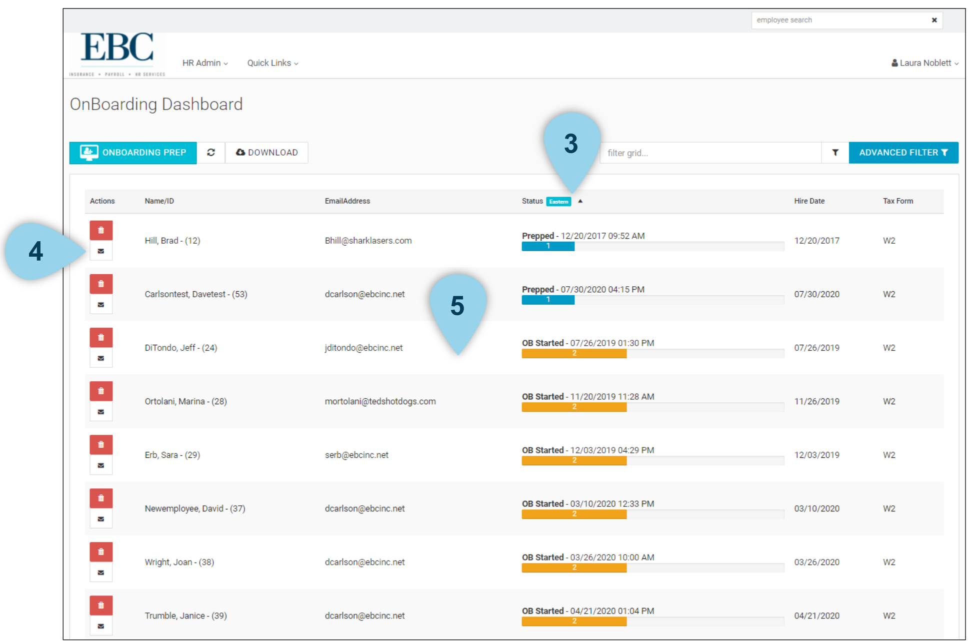
1. Click on HR Admin.
2. Under Onboarding, click Onboard Prep.
3. Select the new employee’s position from the drop down list.
4. Choose an Onboarding Task list from the drop down list.
5. Enter a Hire Date.
6. Click the LET’S BEGIN ONBOARDING button.
7. Fill out the employee information then submit the onboarding request for the employee to complete.

Onboarding Dashboard



To review and update an employee's status through the onboarding process,

1. Click on HR Admin.
2. Under Onboarding, click Onboarding Dashboard.

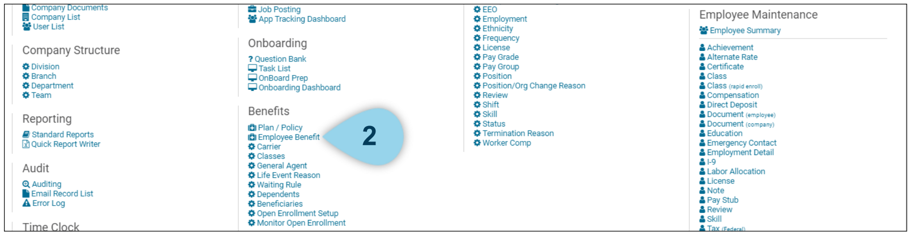


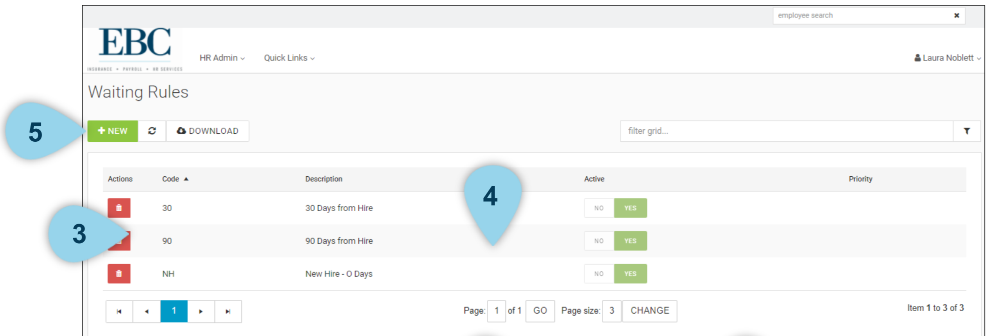
3. The employees onboarding status can be viewed at a glance by scrolling through the list of employees and re-viewing the information in the Status column.
4. Click on the envelop icon to send an onboarding invita-tion.
5. Click on an employee line to review or edit employee details.

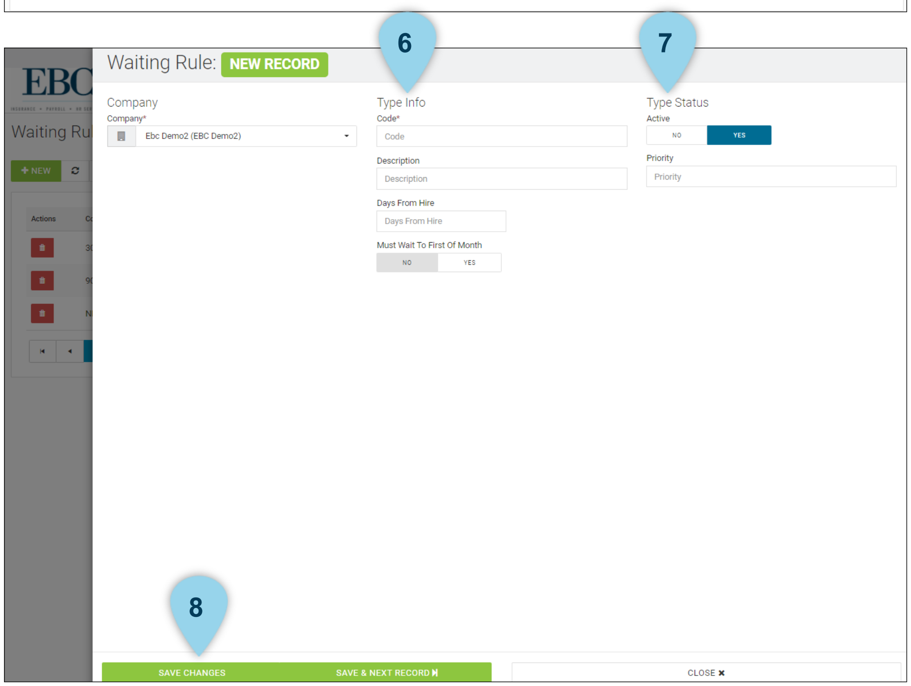
Benefits

This section reviews how to manually add employee benefits and set up open enrollment.

Waiting Rule



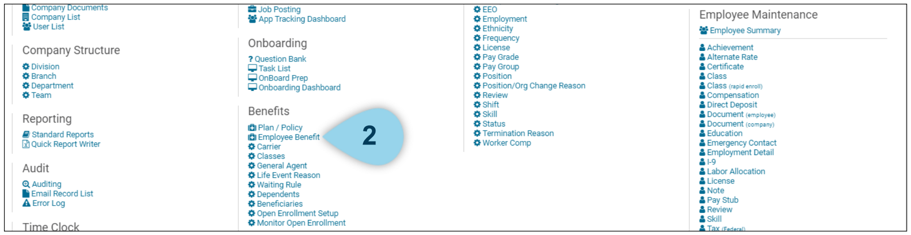




To review or enter a waiting rule,

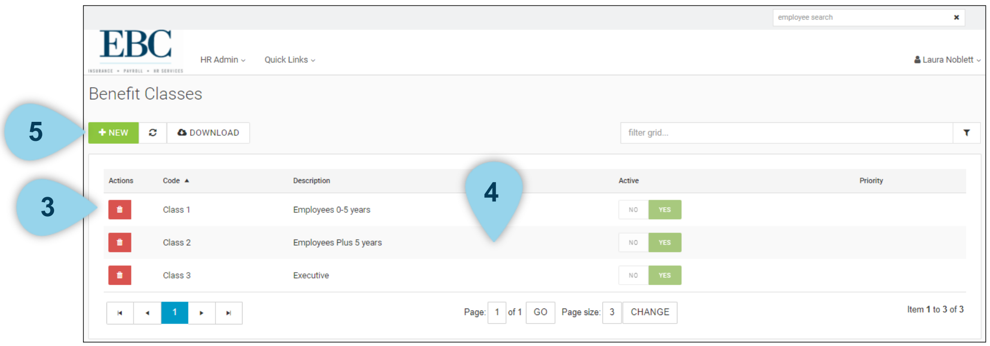
1. Click on HR Admin.
2. Under Benefits, click Waiting Rule.
3. Click on the trash can icon to delete a waiting rule.
4. Click on a rule line to review and edit an existing waiting rule.
5. Click the NEW button to create a new waiting rule.
6. Enter Type info.
7. Update the Type Status.
8. Click the SAVE CHANGES button.

Classes

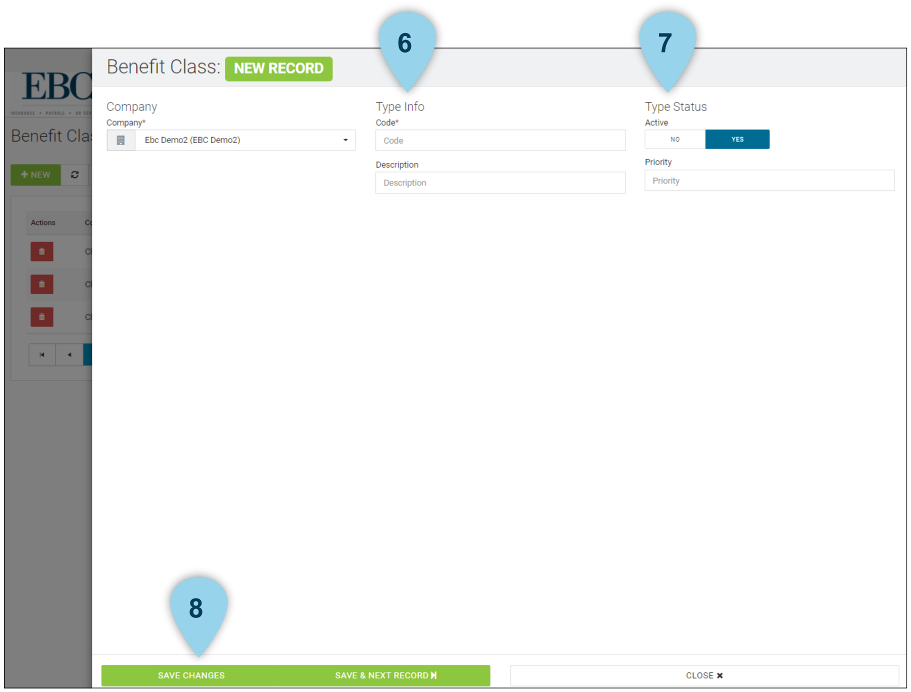


To review or add a class,

1. Click on HR Admin.
2. Under Benefits, click Classes.

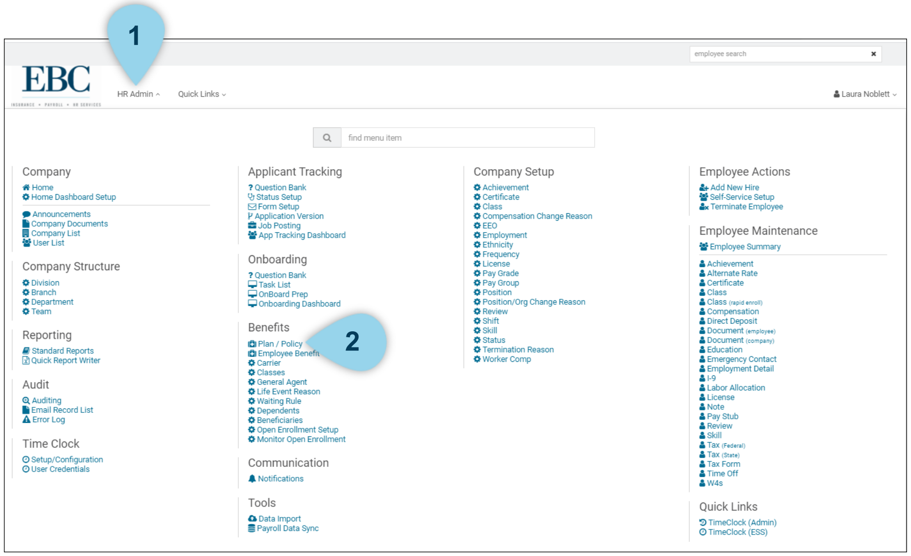


3. Click the trash can icon to delete a class.
4. Click on a class line to review and edit the class.
5. Click the NEW button to create a new class.



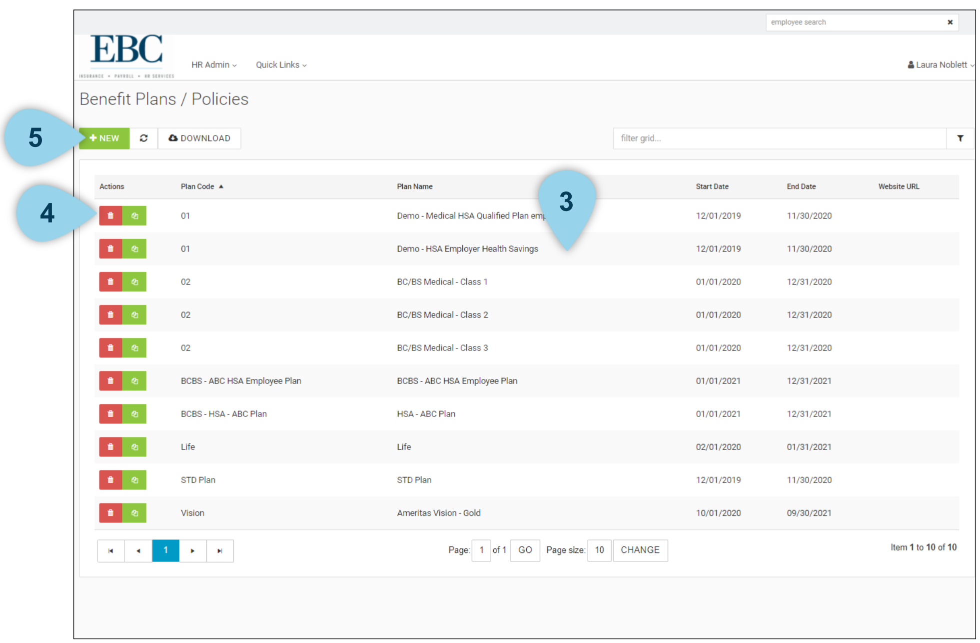
6. Enter Type info.
7. Update the Type Status.
8. Click the SAVE CHANGES button.

Set Up Plans and Policies



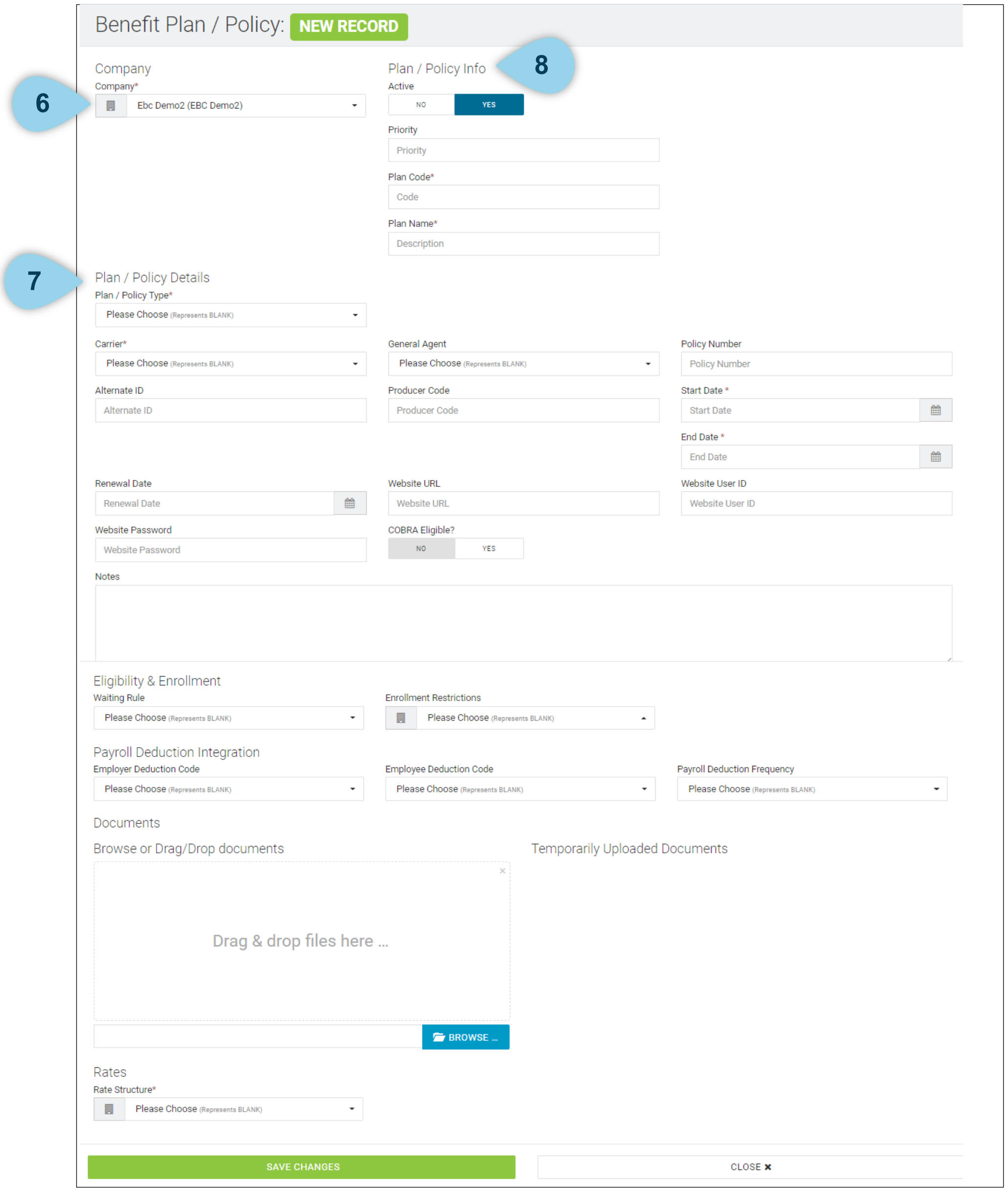
To post a set up a plan or policy,

1. Click on HR Admin.
2. Under Benefits, click Plan/Policy.



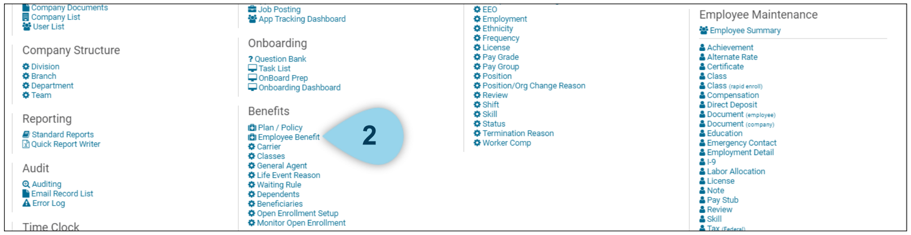
3. Click on a plan/policy to review or edit details.
4. Click on the trash can icon to delete a plan/policy.
5. Click the NEW button to add a new plan/policy.

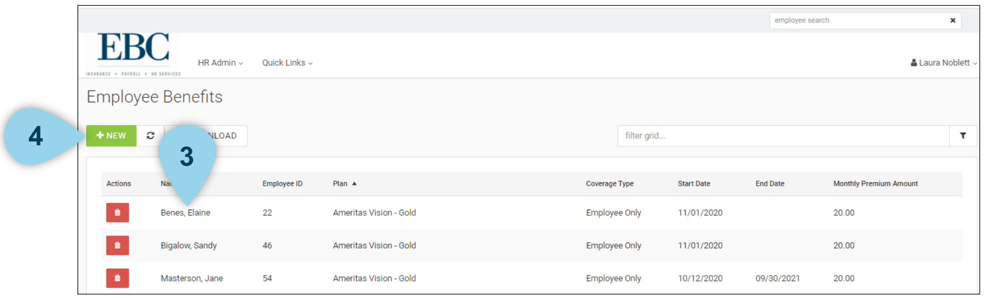
Set Up Plans and Policies

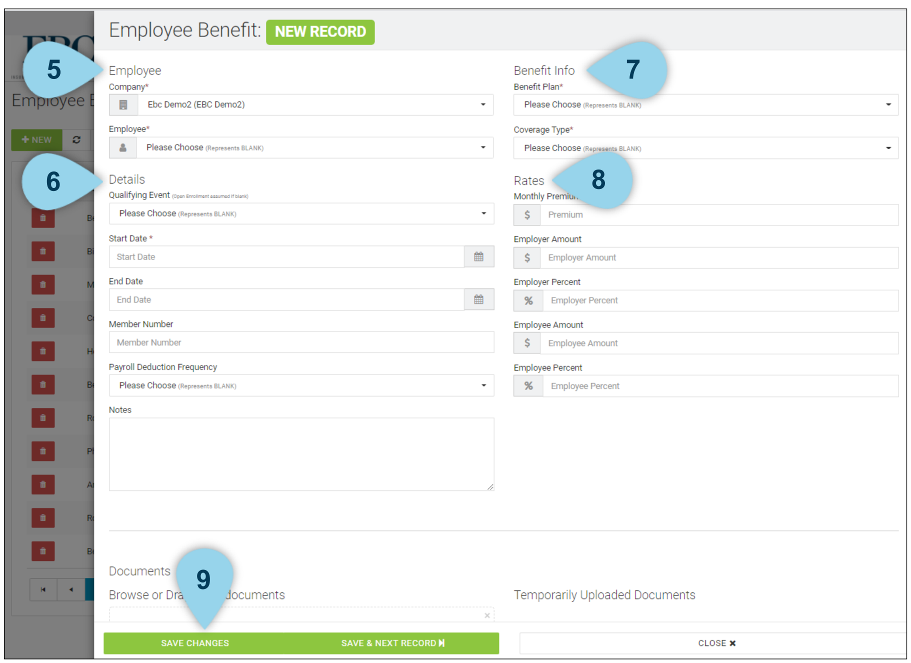


6. Choose a company from the drop down list.
7. Make selections in the Plan/Policy section.
8. Enter Plan Code and Plan Name in the Plan/Policy Info section.
9. Enrollment Restrictions to apply the correct classes from above.
10. Assign the Employer and/or Employee Deduction Codes and Frequency - needed for payroll
11. Rate Structure – controls ER and EE monthly costs for benefit coverages
12. Benefit Naming convention should include the year Plan Code field for easy sorting during maintenance and set-up changes
13. Click the SAVE CHANGES button to save the new plan/ policy.

Employee Benefits







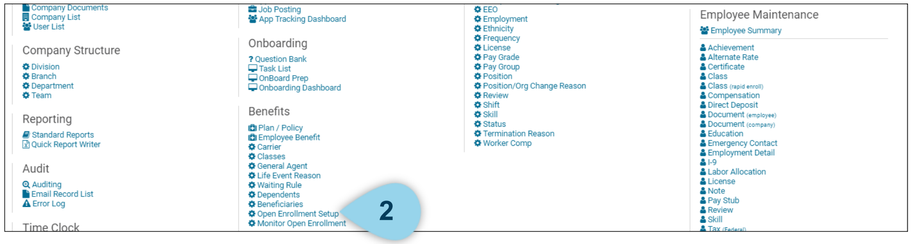
To manually enroll an employee in benefits,

1. Click on HR Admin.
2. Under Benefits, click Employee Benefits.
3. The list will be sorted alphabetically by plan. Click on an employee to view and edit employee benefit details.
4. Click the NEW button to manually enroll and employee in a benefit plan.
5. Choose a company and employee from the drop down options in the Employee section.
6. Select a Qualifying Event and Start Date, enter a Member Number, and select a Payroll deduction Frequency in the Details Section.
7. Select Benefit Plan and Coverage Type in the Benefits Info section.
8. Enter Rates.
9. Click the SAVE CHANGES button.

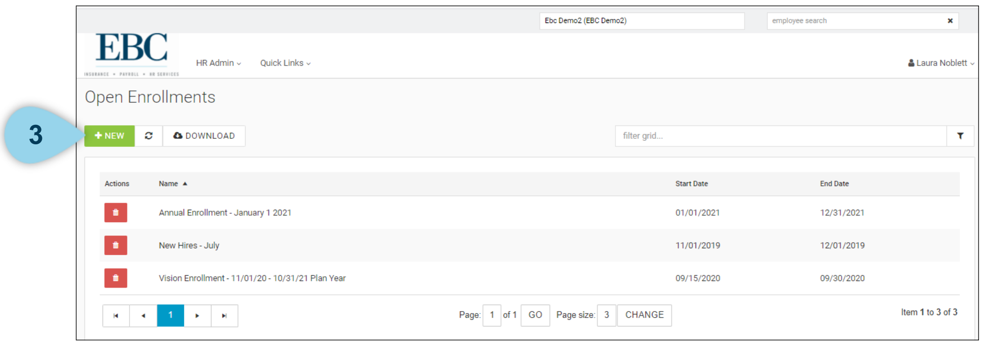
Open Enrollment Setup

To set up a new open enrollment,

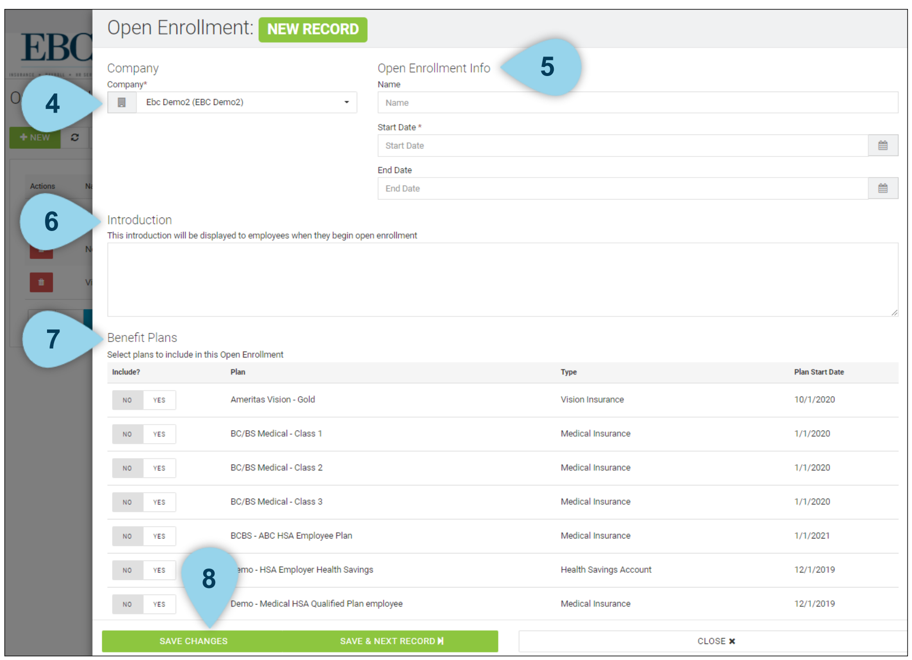
1. Click on HR Admin.
2. Under Benefits, click Open Enrollment Setup.



3. Click the NEW button.



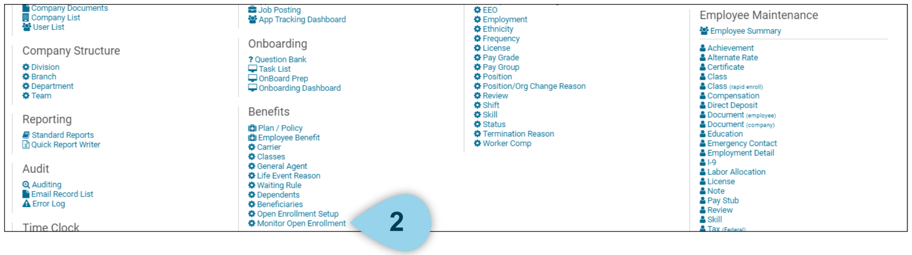
4. Select a company from the drop down list.
5. Enter Name and Dates into the Open Enrollment Info section.
6. Enter a description into the Introduction box.
7. Toggle between NO and YES to include or exclude the listed options in the Benefits Plans section.
8. Click the SAVE CHANGES button to save the new open enrollment.



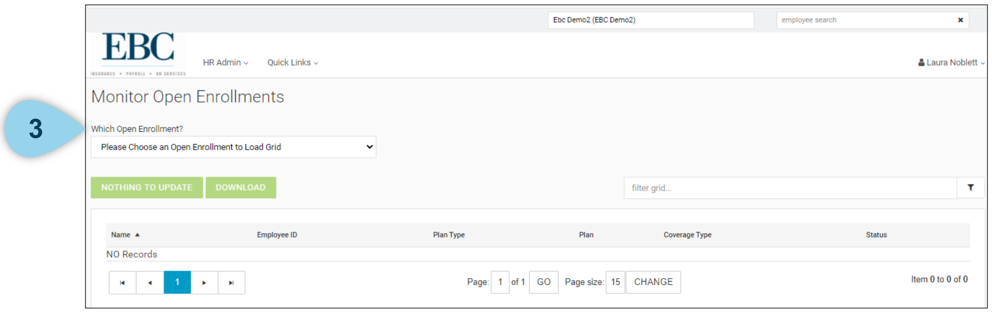
Monitor Open Enrollments

To monitor open enrollment selections,

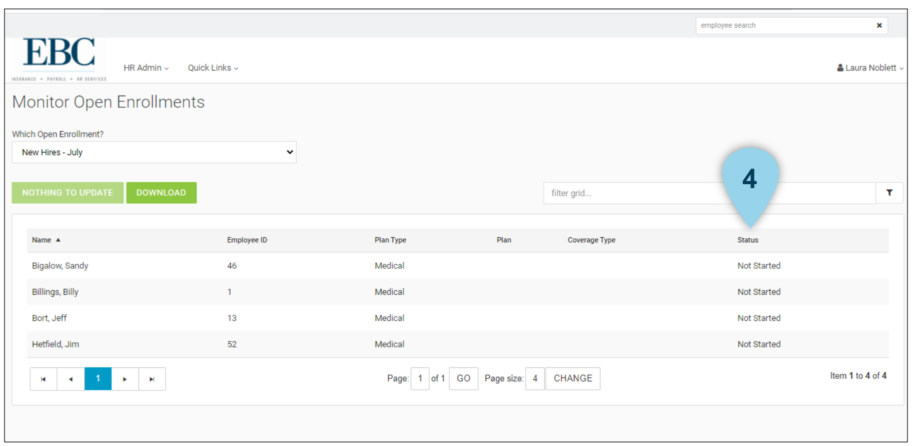
1. Click on HR Admin.
2. Under Benefits, click Monitor Open Enrollment.



3. Choose which open enrollment to review.



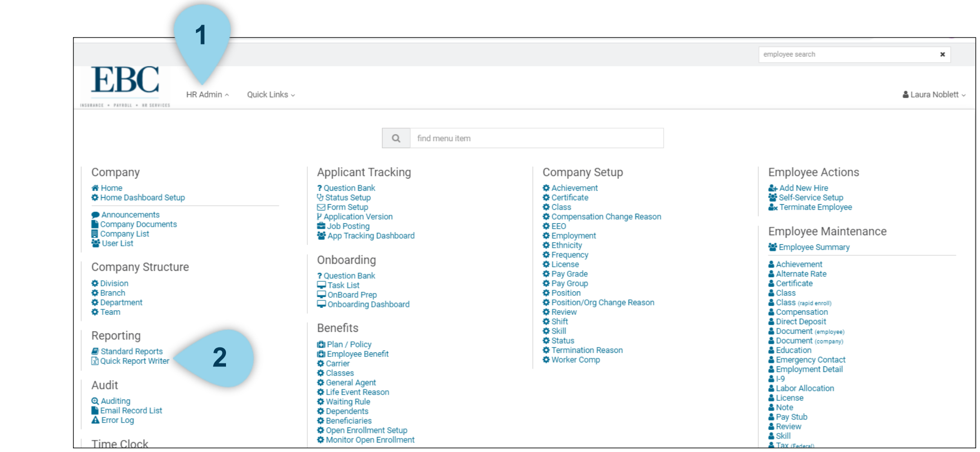
4. Scroll through the list to review plan type and completion status.



Reporting

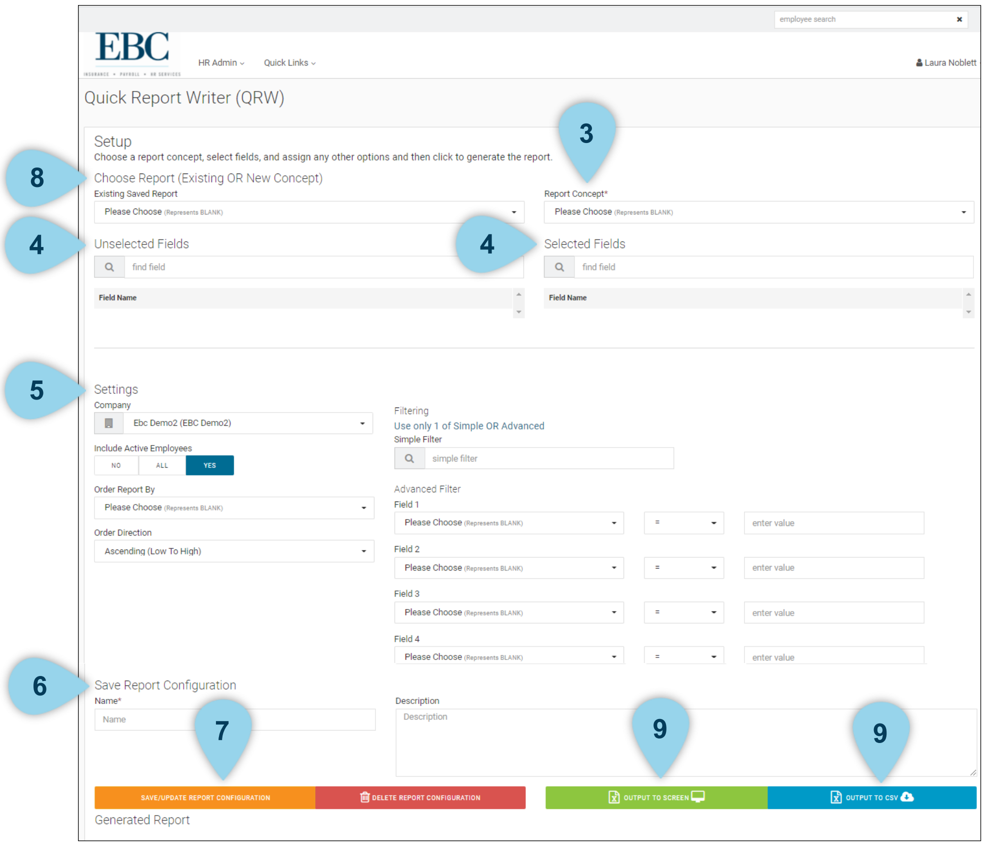
This section reviews how to create and run reports using the Quick Report Writer function.

Quick Report Writer



To run a report using the Quick Report Writer,

1. Click on HR Admin.
2. Under Reporting, click Quick Report Writer.



3. Choose a Report Concept.
4. Once you have selected a concept, applicable field options will appear. Select fields that you want included on the report (i.e. Employee ID, Position, Company Name, etc.).
5. Sort and Filter options based on included report fields.
6. Enter a report name and description to save for later use.
7. Click the SAVE/UPDATE REPORT CONFIGURATION to generate the report.
8. Once a report has been created and saved, you may use it at a later time. To do this, select the saved report from the Existing Saved Report drop down option in the Choose Report section.
9. Click OUTPUT TO SCREEN for easy view or OUTPUT TO CSV to open in excel.