

Administrator Guide

Advanced HR 2.0



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Document Revision History

Doc Version	Software Version	Publish Date	Description
1.0	2.0	10/1/2017	DRAFT in progress.
1.1	2.0	10/4/2017	Added Evolution Classic and Single Sign On Setup section.
1.2	2.0	10/6/2017	Added how to terminate an employee.
1.3	2.0	10/17/2017	Added the Advanced Editor to the Announcements setup page. Added the Allow Private Label field in order to display the company logo. Added changes to the User List screen and how to add a new user. Updated Company Dashboard Setup section. Updated Employee Detail screen section. Added more info to the Onboarding Validation Report section.
1.4	2.0	10/20/2017	Removed the Employee Maintenance tile screens into a new, separate <i>Advanced HR 2.0 Employee Maintenance Guide</i> .
1.5	2.0	11/9/2017	Added creating a Service Bureau Account User & SMTP Email Communications section. Updated My HR and Employee Maintenance menus. Edits made to Appendix 1: Future Dated Fields List and Onboarding Validation Report.

Doc Version	Software Version	Publish Date	Description
1.6	2.0	12/12/2017	Removed Company Legal Address in Classic SSO Setup requirement. Edits made to the Payroll Cutover Process section. SwipeClock setup information added to the Time Clock section. Edits made to Company Dashboard Setup section. Other minor edits made.
1.7	2.0	12/28/2017	Added discussion of Notifications feature. Emphasized set up of E/D Codes prior to performing the Payroll Cutover in the SSO Setup section. Updated HR Admin screenshots to show the new Notification & Note menu items.
1.8	2.0	1/18/2018	Updated My HR and HR Admin screens with Tax Form option
1.9	2.0	1/30/2018	Added Enabled SwipeClock Synch for 1099 button to Company List screen.
1.10	2.0	2/27/2018	Added new Date-Based Notifications. Changed Home Dashboard screen section. Added the Data Import Tool. Added new initial setup step: Verifying Pay Rate Information. Change to Payroll Data Cutover section.
1.11	2.0	3/2/2018	Added the Data Migration Tool in a new section and updated the Payroll Data Cutover section.
1.12	2.0	4/3/2018	Added ability to clone a notification to make a custom notification. Added SSN support for 1099 employees. Added the Download this Record button on the Error Log screen.
1.13	2.0	4/19/2018	Moved the previously separate <i>New Employee Onboarding Guide</i> topics into this Administrator Guide.

Audience and Additional Advanced HR 2.0 Documentation

The intended audience for this guide is Service Bureau administrators and managers. It contains information about how to set up, configure, and maintain Advanced HR 2.0. The following is a list of the other Advanced HR 2.0 User Guides; all are available on the **Evolution Resource Center** for online viewing and/or for downloading.

Advanced HR 2.0 User Guides:



- Applicant Tracking Guide
- Employee Maintenance Guide
- Single Sign On Guide
- Benefits Guide
- Reporting Guide
- Security Guide
- Customizing Security Roles/Users Guide
- Implementation Guide

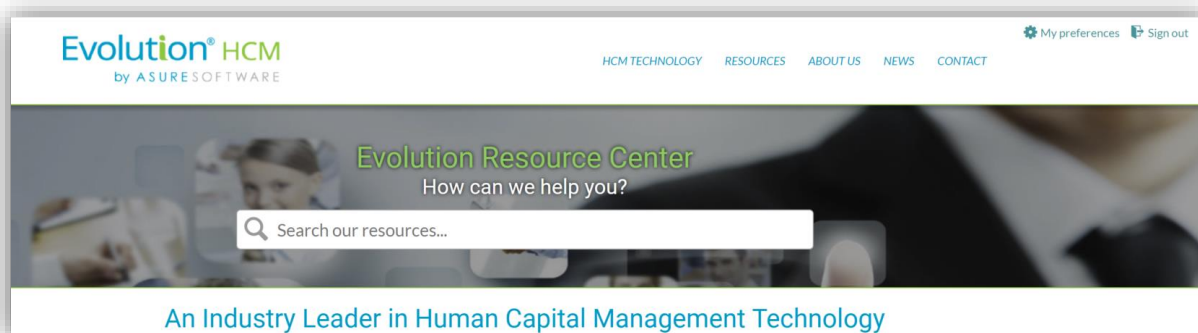
Employee end users should refer to the separate document *Getting Started: Employee End User Guide* which describes Advanced HR 2.0 from the employee user point of view.

Evolution Resource Center

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

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

Your comments are important to us. You can now 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 our Support Department for questions:

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

Email our Training Department to schedule a training:

Training@evolutionhcm.com

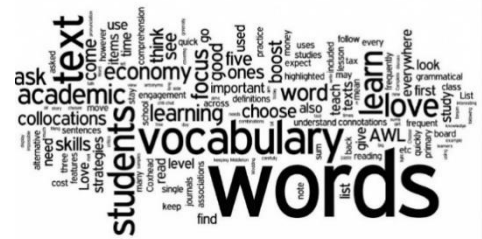
Email our Implementations Team:

AHR_implementations@asuresoftware.com

This User Guide is specifically targeted for Service Bureau system administrators and describes how to set up, configure, and administer Advanced HR 2.0. The following topics are covered in this guide:

- Getting Started
- Creating Service Bureau Admin Users
- Evolution Classic and Single Sign On Setup
- Creating New Users
- HR Admin Menu Items
- Payroll Data Cutover Process
- Data Import Tool
- Data Migration Tool
- Future Dated Fields & Onboarding Validation report

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.
Anonymous Role	<p>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.</p> <p>Users that are not logged in are anonymous users – and thus can only see the pages that do not require logging in – specifically the application and onboarding sections of Advanced HR 2.0.</p> <p>Permissions are assigned to the anonymous user role to suppress visibility or make fields required by applicants or onboarding candidates.</p>

Term	Description
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 role 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 role 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 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.
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.
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.
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 1.0, you now 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 is

Term	Description
	an optional part of performing the Payroll Data Cutover process to onboard a new company – use the Data Migration Tool as an additional final step at the end of the Payroll Cutover process, if applicable.
Job Posting Key	This is the URL that you can place on job boards in order to direct applicants to a job application in Advanced HR 2.0. This is also where you can control the status of a job posting by toggling the status to No or Yes .
Payroll Cutover	Formerly known as Company Onboarding in Advanced HR 1.0. 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.
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.
Resources	<p>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.</p> <p>Resources are what the user is giving (security) Permissions to (see Permissions above).</p>
Self-Service Setup	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 referred to as the Integration User.
Service Bureau (SB) Admin Role	The Service Bureau Admin (SB Admin) role is a step below the Super Admin level of access. The functionality for the SB Admin user level is focused more on 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 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).
Single Sign On (SSO)	Evolution Single Sign On (SSO) allows the user to login to a central location and access both Evolution Payroll and Advanced HR 2.0. With

Term	Description
	this functionality, which is part of the 'Stowe Release', a user logs 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 login as normal, and do not need SSO functionality.
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.


Getting Started

Logging On to 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, will require 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 new SSO Login page.



Sign In

Username

Password
 

SIGN IN

Forgot Password?

To access either Advanced HR 2.0 or Evolution Payroll, if applicable, the user will now be taken to the SSO Login Screen.

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

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

Username

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

The **Dashboard** is a place for employees to view company announcements, a birthdays section, important dates and expirations, links to various items such as employee benefit plans, company documents and other publications. Additional options to display on the Dashboard to employee self-service users are upcoming reviews, and any expiring certification and license reminders.

The screenshot displays the Evolution HCM Advanced HR 2.0 Dashboard. The top navigation bar includes the Evolution HCM logo, user information (Shelburne Farms 03, Mike Blake), and a sign-out button. The main content area is titled 'Dashboard' and is divided into several sections:

- Company Announcements:**
 - Employee Dinner Cruise - 10/20/2017:** A notice about a dinner cruise on Lake Champlain.
 - Food Drive - 8/16/2017:** A notice about collecting donations for a local food bank.
 - Open Enrollment - 8/16/2017:** A notice about the 2017 Open Enrollment period.
 - Bowling night - 8/8/2017:** A notice about a bowling game for the Dairy Dingers team.
- Birthdays:** A table listing birthdays for employees:

Birthday	Employee
October 25	Alfonso, Jamison (12)
November 20	Smithers, Jackson (13)
February 2	McBrittish, Rockford (4)
February 8	Webb, Chock (7)
- Certificate Expirations:** No Certificates expiring in upcoming months.
- License Expirations:** No Licenses expiring in upcoming months.
- Scheduled Reviews:** No Reviews in upcoming months.
- Time Off Requests (Pending):** A table listing pending time off requests:

Time Off Start	Employee	Type
08/23/2017	Braverman, John (8)	PTO
08/31/2017	Forsyth, Megan (1)	PTO

Advanced HR 2.0 Dashboard Sample


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

In addition, **Base Users** will be able to **Acknowledge**:

- Employee reviews
- Classes
- Expirations

An **Acknowledge** icon displays on the Dashboard that when clicked, will generate 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 icon will no longer display on the Dashboard.

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

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

Dashboard Setup

Company
Select a company to proceed with Dashboard (Home Page) Setup
Company
Shelburne Farms 03 (SF03)

Dashboard Settings
Complete each section and setting

Admin: Toggle sections (ON=Green/Yes)

No

Yes

Announcements

No

Yes

Birthdays (admin)

No

Yes

Certificate Expirations (admin)

No

Yes

License Expirations (admin)

No

Yes

Scheduled Reviews (admin)

No

Yes

Time Off Requests (admin)

No

Yes

Anniversaries (admin)

Other Settings
Future Period to Review (months)
6

Acknowledgements allows 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.

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

Now that the Dashboard settings for the Base Users, Base Manager, and Base Admins have been set, when those users login, they will be taken to the appropriate Dashboard view.

Managers may have a **Time Off Requests** section display on their Dashboard which they can click on to approve the employee's time off request.

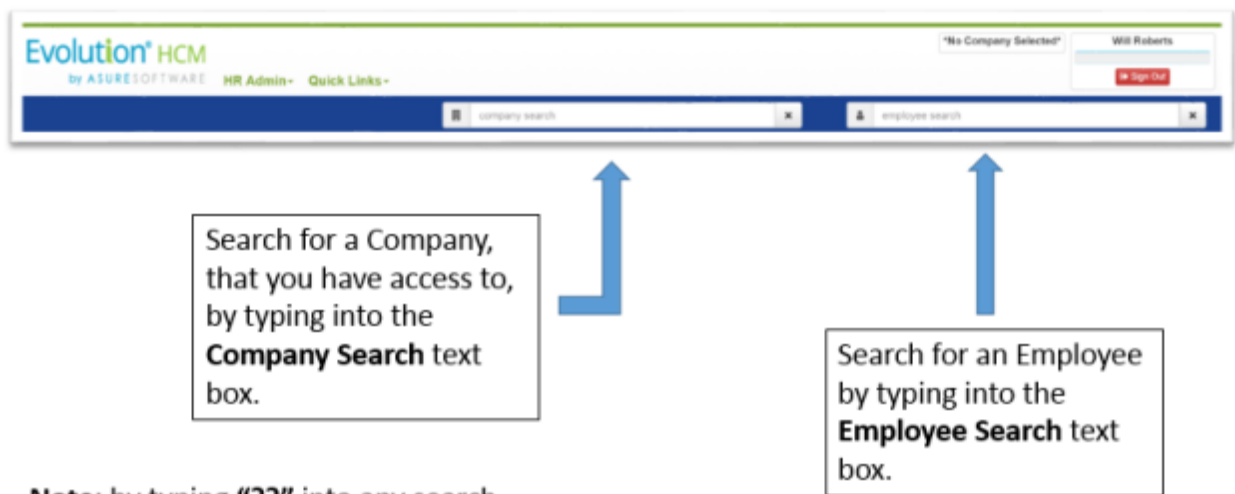
Note: System Administrators configure how the Dashboard appears to users on the **HR Admin – Company – Home Dashboard Setup** screen. Refer to the [Home Dashboard Setup](#) section of this document.

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 a Company and Employee search box display.



Note: by typing "??" into any search field will give a list of all entries.

If you type/select a company in the company search field, you'll be locked into that company. See more information about this below.

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

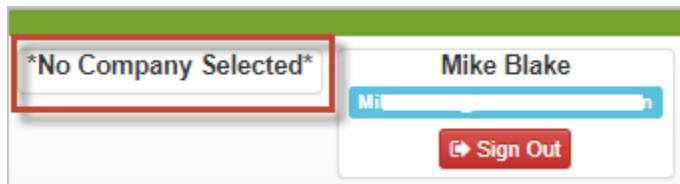
Once you select an employee and/or company, Advanced HR will lock the selections (company / employee) until you change them. This action is referred to as “locking down a company” or “locking on an employee.”



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

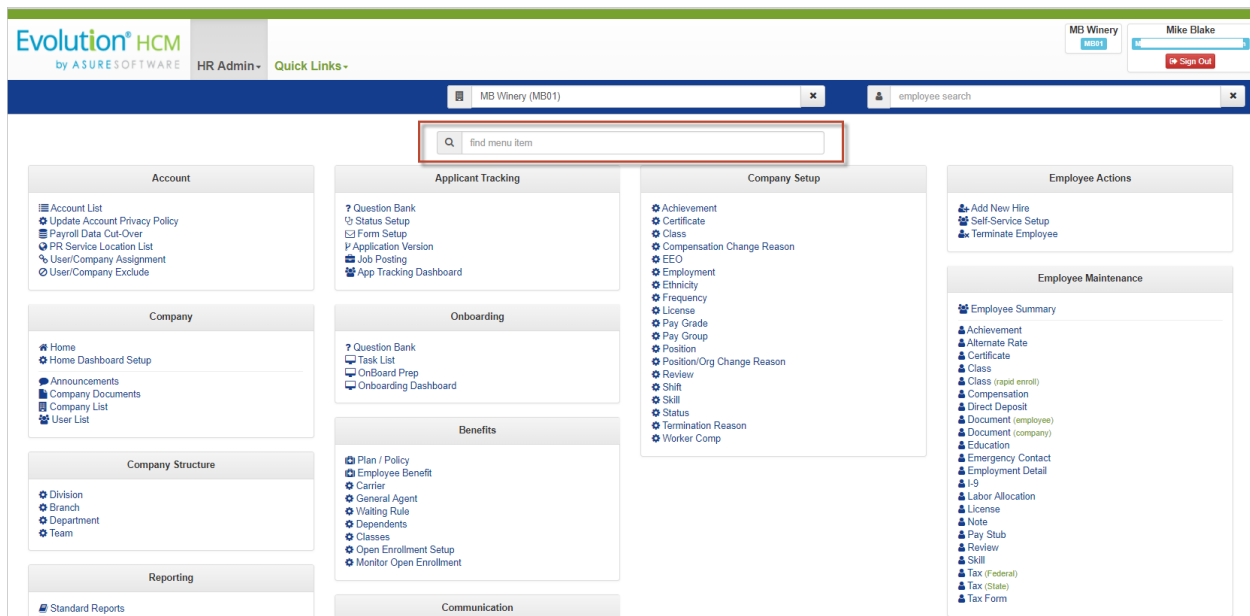


Note: If you haven’t locked down a company, the system displays a **No Company Selected** message at the top right of the screen.

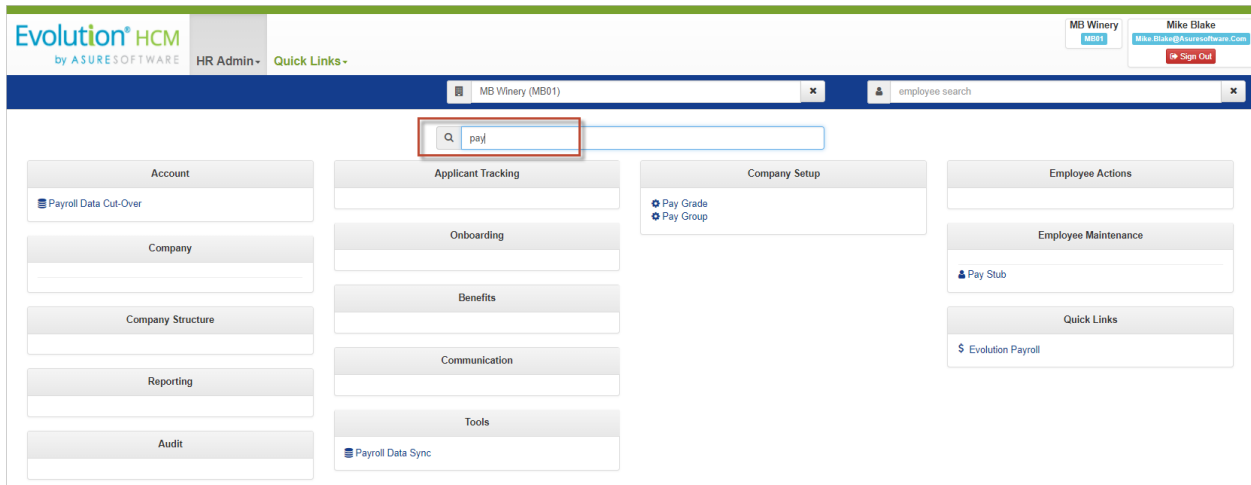


Find Menu Item Filter

On 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 2.0 will remove all of the menu items that do not apply.







In the example below, we start to type the word “pay”. Advanced HR 2.0 then displays only the menu items that have “pay” in the title.









Filter Grid

Every dashboard has a **Filter Grid**. Simply type a word or a partial name into the grid and press **Enter**. Advanced HR 2.0 will display all relevant entries.

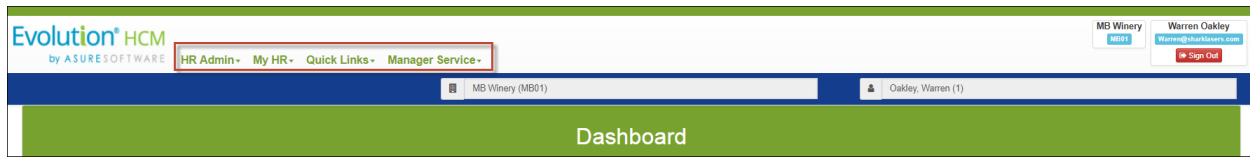
Standard Report List 

Actions	Name -	Description	Category	Active	Available To
	Absence Types	Absence Types List Report	Company Setup	No Yes	SuperAdmin
	Achievement Types	Achievement Types List Report	Company Setup	No Yes	ManagersAndAbove
	Audit List	Full List of Audit records for the specified date range - including system and setup records.	Internal System	No Yes	AdminsAndAbove
	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

Module Links on the Dashboard

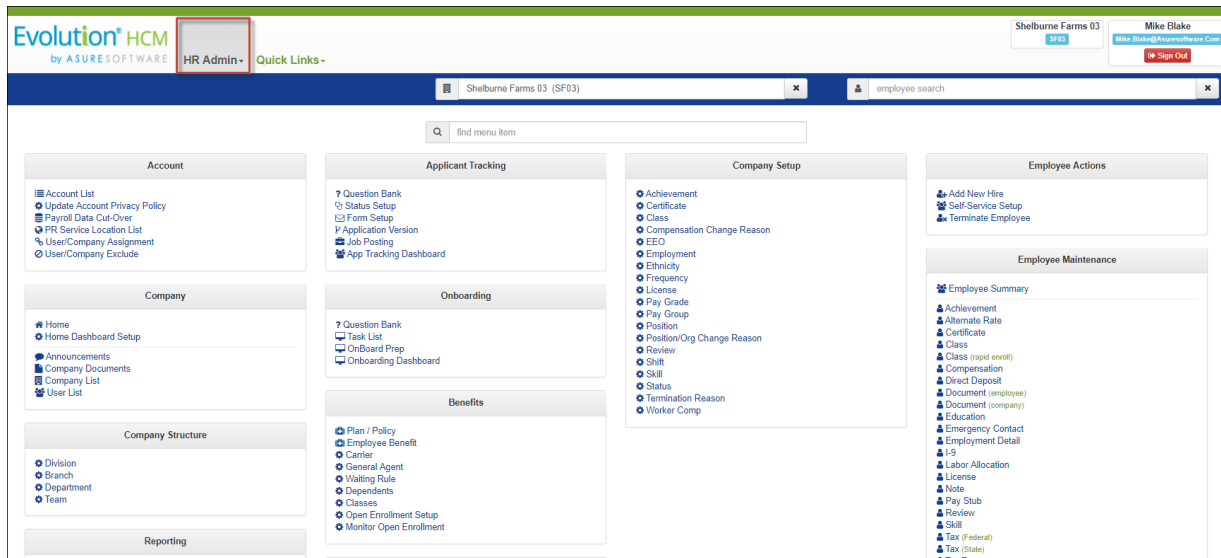
Located just above the **Dashboard**, there are links to different modules or segments of Advanced HR 2.0. The specific links that display vary by the user’s assigned level of security role access which is set by the system administrator.



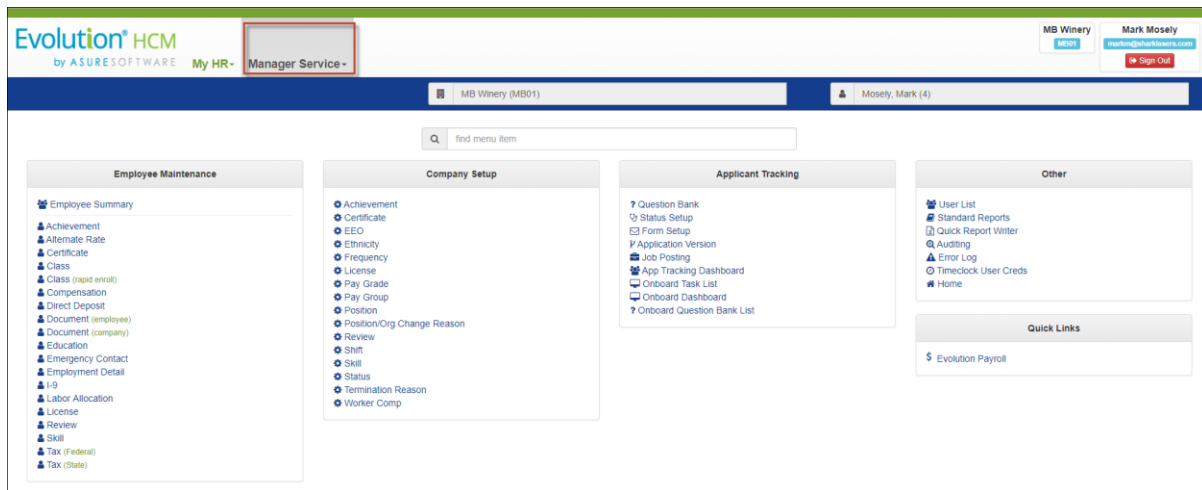
The above screenshot and the following table describes ALL of the potential **Dashboard** screen module links that may be present, depending on the user's role. The specific user's **Dashboard** links will probably have only one or two of these tabs.

Menu Category	Description
HR Admin ▾	Displays the HR Admin (istration) module sub-menu options where system administrators can set up and configure the system and 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 roles 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 role – the menu categories are: Employee Maintenance , Company Setup , Applicant Tracking , and Other .

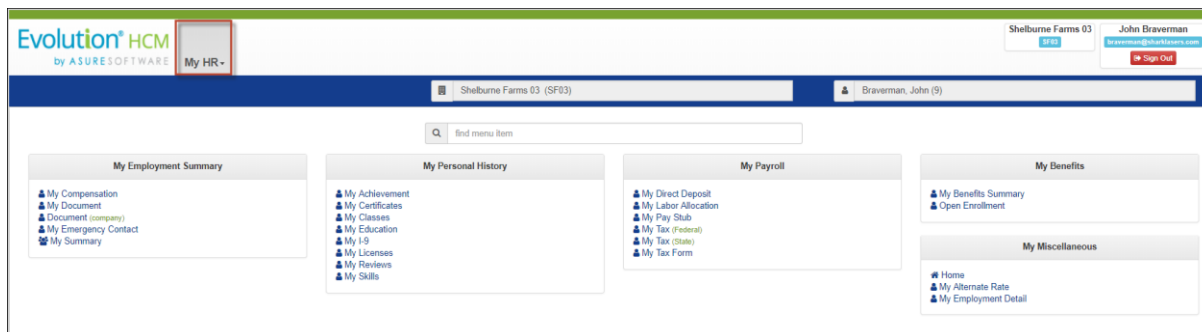
After clicking on one of the module links such as **HR Admin**, you will be presented with a sub-menu of available options. A sample **HR Admin** module sub-menu, a sample **Manager Service** sub-menu, and a sample **My HR** menu are shown in the following examples. Note the different options on each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



HR Admin Menu Screen



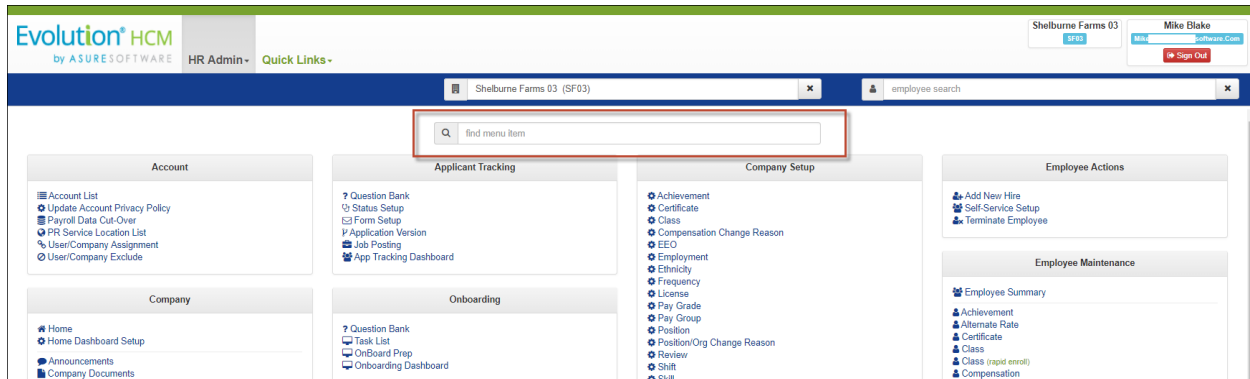
Manager Service Menu Screen



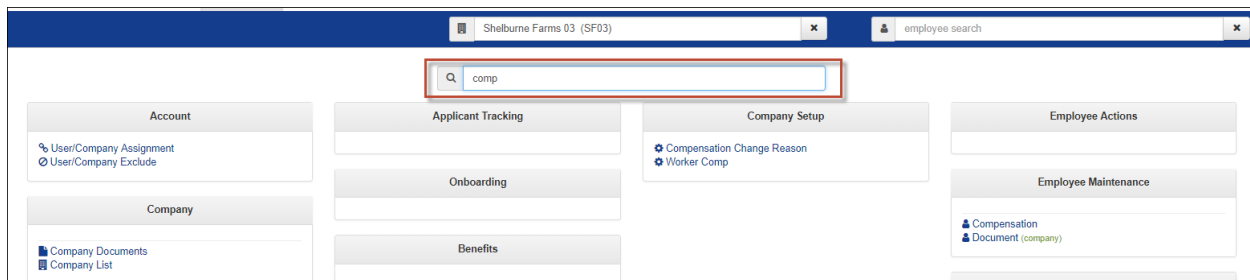
My HR Menu screen for a Base User employee

Using the HR Admin Screens

Click on a menu item on the **HR Admin** screen to display the corresponding screen. If you are unsure where to start, you can simply type what you are looking for in the **find menu item** search field in the center of the screen.



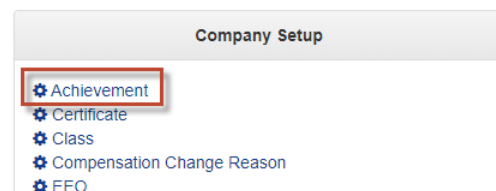
In the following example, if you stop typing the word “compensation” at “comp” Advanced HR will filter the menu and present only those options that have that specific string of characters. If you continue typing, the only options that display are shown below.



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



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 of all data within that option.






Summary Screen

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

Achievement Types  

[+ New](#)  [Download](#) 

Actions	Code	Description	Active	Priority
	SY	5 Year Service	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	
	QOSA	Quarterly Outstanding Sales Award	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	
	SYA	Salesperson of the Year Award	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3


Detail Screen

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

Achievement Type: **SYA**

Company

Company

 MB Winery (MB01)

Type Info

Code

SYA 

Description

Salesperson of the Year Award

Type Status

Active

No ☐ Yes ☒

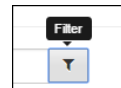
Priority

Priority



The **Prev Record** and **Next Record** buttons (shown at right) allow you to quickly scroll through all available employee records.











Sub-menus 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.




Employment Types  



[+ New](#)  [Download](#) 

Actions	Code	Description	Active	Priority
	1099	1099	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	
	FullTime	Full Time	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	
	FullTimeTemp	Full Time Temp	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	
	HalfTime	Half Time	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	
	NA	N/A	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	
	Other	Other	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	

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


Employment Types 




[+ New](#)   full 


Actions	Code	Description	Active	Priority
	FullTime	Full Time	No Yes	
	FullTimeTemp	Full Time Temp	No Yes	

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

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”).

Achievement Types 

[+ New](#)   Agent+Registration 

Actions	Code	Description	Active	Priority
	ARC	Agent Registration Card	No Yes	

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

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 right. Clicking on the **+ New** button will open a data entry screen.

[+ New](#)

Achievement Type: [NEW RECORD](#)


Company

Company

 MB Winery (MB01)

Type Info

Code

Code 

Description

Description

Type Status




Active

No Yes

Priority

Priority

Achievement Type: [NEW RECORD](#)

 Save Changes  Save & Next Record  Close

Note: Any required fields in Advanced HR 2.0 are identified with a red asterisk, an example is shown at right.

Type Info

Code

Code 

Description

Description

Throughout Advanced HR 2.0, when you complete a field correctly, the system displays a green checkmark, an example is shown at right.

Tax Form (Type of Hire)

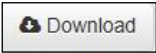
W2 - Employee 

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.



Tip: 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 fill in a required field when you try and save the changes.






The  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 Beginning Sales Training
SALES1	Passed Beginning Sales Training
SALES3	Passed Advanced Sales Training

Tip: 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 **Company Documents** screens, you can download a summary of all documents or download the actual document by clicking on the link in the **Download** column to the left of the document **Filename**.

Company Documents  

[+ Add Documents](#)  [Download](#)

Actions	Company	Download	Filename	Category	Title	Published to Employee	Upload Date	Size (KB)	Upload By
	MB Winery		fourth of july.png	Announcement	Fourth of July Company BBQ	No Yes	05/25/2017 09:03 AM	11	mblake@evolutionhcm.com
	MB Winery		MB Winery Company Handbook.pdf	HR Dept. Document	Company Handbook	No Yes	05/25/2017 03:58 PM	2507	mblake@evolutionhcm.com
	MB Winery		MB Winery Holiday Schedule.docx	HR Dept. Document	Holiday Schedule	No Yes	06/09/2017 09:22 AM	11	mblake@evolutionhcm.com
	MB Winery		wine logo 3.png	Company	Company Logo	No Yes	05/25/2017 08:36 AM	9	Warren@sharklasers.com
	MB Winery		wine logo.png	Announcement	Best in Class Award	No Yes	05/25/2017 09:01 AM	8	mblake@evolutionhcm.com

Page: 1 of 1 Go Page size: 5 Change Item 1 to 5 of 5

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.

Compensation

Pay Type +

H - Hourly

Pay Frequency +

B - Biweekly

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.

+ Add Pay Type

Type Info

Code

Description

Type Status

Active


Priority

Save Close

Summary screen lists may have an option to change the page record length at the bottom of the list. Simply modify the **Page size** field 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.

9	Service Workers	No	Yes
EE3	EEO Cat 3	No	Yes
EEO1	EEO 1	No	Yes
EEO2	EEO2	No	Yes

Page: 1 of 1 Go Page size: 13 Change Item 1 to 13 of 13

Some fields in Advanced HR 2.0 have information icons next to them – a blue circle with an “i” , see the following example. 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.

Taxes

Federal i

Filing Status

Please Choose (represents BLANK)

Exemptions

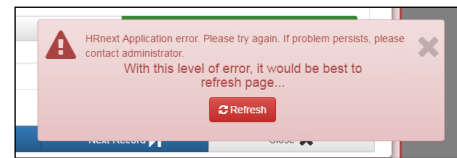
Exemptions

Federal Tax Notes

Valid filing status codes are Single (S), Married (M), single Non-Resident Alien (NRA), and married Non-Resident Alien (NRM). Enter S for employees claiming head-of-household or married filing at the higher single rate. Enter the number of exemptions claimed on form W4 in the Exemptions field.

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

You may encounter this warning when making changes to records. In almost all cases it is preventing you from doing something that should not be done, such as deleting a code that already exists in history or end dating a deduction before the start date.



If you receive this warning, simply close out the warning by clicking the **X** or the **Refresh** button and analyze what you are trying to do for common issues. If you cannot identify the problem, call support for assistance.

Logging Out of Advanced HR 2.0

To log out of Advanced HR 2.0, simply click the **Sign Out** button at the top right of any screen.

To log out of Advanced HR 2.0, click the red **Sign Out** button at the top right corner of any screen.



Creating Super Admin Users

Initially, you'll want to create a limited number of **Super Admin** users for Advanced HR. Super Admin users have complete access to all companies, users, and setting functions in Advanced HR. These users administer access for the Service Bureau Admin and all Client Users. The Super Admin is an employee of the service bureau. It is best practice to only have 2 or 3 Super Admin level users per Service Bureau.

Note: It is best practice to create, and or, designate **Super Admins**, **Service Bureau Admins**, and any **Other** company level employees that need access to Evolution Payroll, such as Payroll Managers, BEFORE they sign into Evolution Classic for the first time AFTER the Evolution Single Sign On feature has been activated.

Setup Pre Payroll Data Cutover

If the Service Bureau has not yet performed a [Payroll Data Cutover](#) on their own company, Super Admin(s) status should be created in Evolution Classic first:

The screenshot shows the 'Evolution 18.00.00.01' interface with the 'Admin - Security - Users' window open. The 'Details' tab is selected for user 'Will Roberts'. The 'E-mail Address' field is highlighted with a red box, showing 'Will.Roberts@'. The 'AHR User Type' field is also highlighted with a red box, showing 'SuperAdmin' selected. Other fields include 'User ID' (Will), 'Last Name' (Roberts), 'First Name' (Will), 'Initial', 'Active User' (Yes), 'Password', 'Confirm Password', 'Password Change Date' (7/20/2019), 'Security Level' (Administrator), 'Department' (Customer Service), 'Analytics Personnel' (N/A), 'User's stereotype' (Web), and 'Evolution Payroll' (checked).

1. In Evolution Classic, go to **Admin – Security - Users**. Find the user you would like to designate as a **Super Admin**. Click on the **Details** tab.
2. Enter a valid **Email Address**.
3. In the **AHR User Type** field, select the **SuperAdmin** option.
4. Click **Post** and **Commit**.

Remember! It is best practice to only have 2 or 3 Super Admin level users.

5. When clicking on the URL for either Advanced HR 2.0 or Evolution Payroll, the user will now be taken to the **Evolution Single Sign On login** screen. Using their Evolution credentials, they'll be able to login and access both systems. Once Single Sign On is activated, this will become the login screen for all users.

Creating Service Bureau Admin Users

One of the first tasks you'll want to do is to identify the people who will have the **Service Bureau (SB) Admin** roles, assign them the Service Bureau Admin role, and then assign them the companies that they will have access to. This section will discuss both tasks:

- Create Service Bureau Admins
- Assign Companies to Service Bureau Admins

Note: It is best practice to create, and or, designate **Super Admins**, **Service Bureau Admins**, and any **Other** company level employees that need access to Evolution Payroll, such as Payroll Managers, BEFORE they sign into Evolution Classic for the first time AFTER the Evolution Single Sign On feature has been activated.

Create a User with a Security Role of Service Bureau (SB) Admin

Perform the following steps to create a user with a security role of **Service Bureau (SB) Admin**:

1. Go to **HR Admin – Company – User List**.
2. Click the green **New** button.

User: **NEW RECORD**

User Info Username <input type="text" value="Username (email)"/> *	Contact First Name <input type="text" value="First Name"/> * Last Name <input type="text" value="Last Name"/> * Timezone <input type="text" value="Please Choose (represents BLANK)"/> *	Administration Is Super Admin <input type="button" value="No"/> <input type="button" value="Yes"/> Is Service Bureau Admin <input type="button" value="No"/> <input type="button" value="Yes"/>	Evolution Administration Payroll Rights Granted <input type="button" value="No"/> <input type="button" value="Yes"/> Company Rights Granted <input type="button" value="No"/> <input type="button" value="Yes"/> Employee Rights Granted <input type="button" value="No"/> <input type="button" value="Yes"/>
Password <input type="password" value="password"/> Create Date <input type="text" value="10/10/2017 03:45 PM"/> Active <input type="button" value="No"/> <input checked="" type="button" value="Yes"/> Locked Out Until Date <input type="text" value="Locked Out Until Date"/>			

3. Enter a **Username** (needs to be an email address).
4. Enter the **Contact info** and the **Timezone**.
5. In the **Administration** section, use the **No/Yes** toggle to designate them as a **Service Bureau Admin**.
6. The **Evolution Administration** section is used to specify if the user needs access to payroll; these are the Evolution AHR 2.0 Security groups.

The next step is to assign the Service Bureau Admin to the companies they should be able to access.

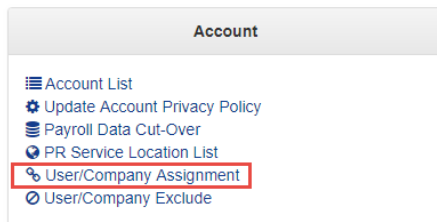
Assign Companies to Service Bureau Admins

Now that you've created your **Service Bureau Admin** user, it's time to assign them the companies that they'll have access to.

Note: If the company is not assigned to the **Service Bureau Admin**, the user will not be able to access any information regarding the company or its employees.

To assign a company to a Service Bureau Admin:

1. Go to **HR Admin – Account – User/Company Assignment**.



2. The system displays the **User/Company Assignment** screen.

 A screenshot of the 'User/Company Assignment' screen. The title bar says 'User/Company Assignment' with icons for users, a key, and a grid. The main heading is 'Assign users to companies'.

STEP 1 - Choose a User
 To begin process, choose a user you'd like to assign to a company or multiple companies.
 A dropdown menu shows 'iceman@sharklazers.com - Robert Drake'.

STEP 2 - Select Companies
 Select the companies that the above user should have access to.
 There is a 'Download' button and a 'filter grid...' dropdown.

 A table with columns 'Company Assigned', 'Company Name', and 'Code' is shown. The 'Company Assigned' column has 'No' and 'Yes' toggle buttons.

Company Assigned	Company Name	Code
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Shelburne Farms 01	SF01
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Shelburne Farms 02	SF02
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Shelburne Farms 03	SF03
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Shelburne Farms 04	SF04

3. Select a user from the **Choose a User** dropdown in **Step 1**.
4. Select the companies that you'd like the Service Bureau Admin to have access to in **Step 2 – Select Companies**. In the **Company Assigned** column, set the Yes / No toggle to **Yes** to grant access to that company to this user.
5. When you enable access, the system will update automatically; there is no Save Changes button.

Using the **No/Yes** toggles, you can easily give access to users or even exclude access. Once access is enabled, the Service Bureau (SB) Admin will have access to the company.

For more information about the Security Roles, refer to the *Advanced HR 2.0 Security Guide*.

Evolution Classic and Single Sign On (SSO) Setup

Evolution Single Sign On (SSO) allows the user to login to a central location and access both Evolution Payroll and Advanced HR 2.0. With this functionality, which is part of the **Stowe Release of Evolution Classic**, a user can login with a single username and password to gain access to both Evolution Payroll and Advanced HR 2.0 without using different usernames or passwords or without having to log in multiple times.

There are preliminary steps that need to take place. However, once SSO is enabled by the Evolution IT Department, and the user signs in, the service will authenticate the end user for all the applications the user has been given rights to. This will also eliminate the need for further prompts when the user switches applications during the same session. In this lesson we'll outline the steps necessary to enable this functionality.

Evolution Single Sign On:

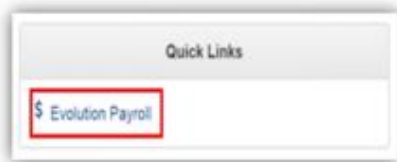
- Provides access to two systems.
- Once turned on, it is on for ALL Evolution users.
 - Users will be taken to a new login screen.
- Requires some pre-work before it can be enabled.
- Requires the Service Bureau to be on the Stowe version of Evolution Classic.
- SSO is only for users that need to access payroll functions.

User Email Addresses will be required for all users when Single Sign On is turned on.

It's important to remember that to enable SSO, a support case must be created. The service bureau should call our Support Department and request SSO activation. This, in turn, will alert the IT Department to begin the process.

Evolution Single Sign On in Action

With Evolution Single Sign On, the user, while logged in to Advanced HR 2.0, has the ability to easily jump to Evolution Payroll and back again.



When clicked, a new browser tab will automatically open for your Evolution Payroll environment.



Note: 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 login as normal, and do not need SSO functionality (although they also use the new SSO login screen).

Single Sign On and Security Roles

Access and functionality in Advanced HR 2.0 is dependent on a user's **Security Role**. In Advanced HR 2.0 there are four end-user security roles:

- Base User Anonymous
- Base User
- Base Manager
- Base Admin

There are also two security roles that are primarily designed for the back-end Service Bureau user:

- Super Admin
- Service Bureau (SB) Admin

For the purposes of this guide, we will focus on the role of Super Admin who needs access to both Advanced HR 2.0 and Evolution Payroll. Security Role setup will be covered in other guides.

As has been mentioned, with the introduction of SSO, you will be able to create users with payroll access in Evolution Classic as well as, Advanced HR 2.0. For the Evolution Classic user, it is recommended that you follow this workflow.

Evolution Single Sign On Requirements and SSO Setup

The following is a list of the setup requirements for Evolution **Single Sign On**. More details are discussed below the list for most items.

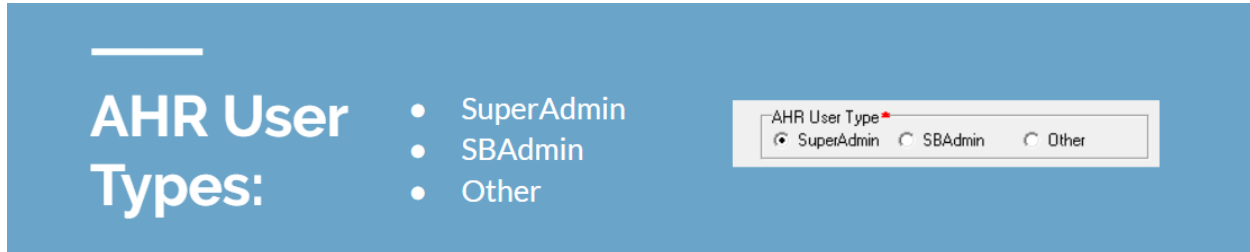
Note:

All users in Evolution are required to have a valid, unique email address. Update user email addresses in the **Admin - Security - Users - Details** tab in Evolution.

- Evolution “Stowe” Version (V. 18 or higher)
- Employees must have a valid, unique email address entered in **Employee – Employee, Self-Serve, Settings** pane in order to access the Employee Self Service. These will become the **Usernames** for the employees in Advanced HR 2.0
- Create a **Service Account User** in Evolution Classic (see this section later in this guide).
- There are three new **Security Groups** for client users (**AHR 2 Company, AHR 2 Employee, AHR 2 Payroll**). These groups ensure the proper Payroll Rights are assigned to users who need access to Payroll data.
- New HR User type (**Admin - Security – Users, Details** tab)
- Enable the **Service Account user** (Verification code and URL)
- Turn On the SSO functionality
- **Future Dated Fields.** Certain fields with future effective dates will need to be adjusted prior to the [Payroll Data Cutover](#).
- **E/D codes.** It is important to remember that before the [Payroll Data Cutover](#) is executed, the company’s Earning and Deduction Codes need to be designated as “**Show in EE Portal**”. It is best practice that all the E/D codes are designated in this manner. Go to **Company – General - E/Ds - Details** tab. In the **E/D Details** section, set the **Show in EE Portal** option to **Yes**.
- Verifying Pay Rate information
- Company Information

Service Bureau User Setup

The following **AHR User Types** have been added to Evolution Classic on the **Admin – Security – Users – Details** tab:



These User types in Evolution Classic correspond to three user types within Advanced HR 2.0. For any users that are already in Evolution, you should update their AHR User Types. These user types paired with their AHR Roles will provide the appropriate user clearance in Advanced HR 2.0.

- The **SuperAdmin** user type is reserved for one or two Service Bureau high level users. This user can see all clients and can create users.
- The **SBAdmin** user type is a Service Bureau user who may not have access to all clients.
- The **Other** user type is reserved for your client users. These are the HR admin and payroll processors at your client level. They will not have access to all clients (they can have more than one company assigned if needed) and they will not be able to run the Payroll Data Cutover process.

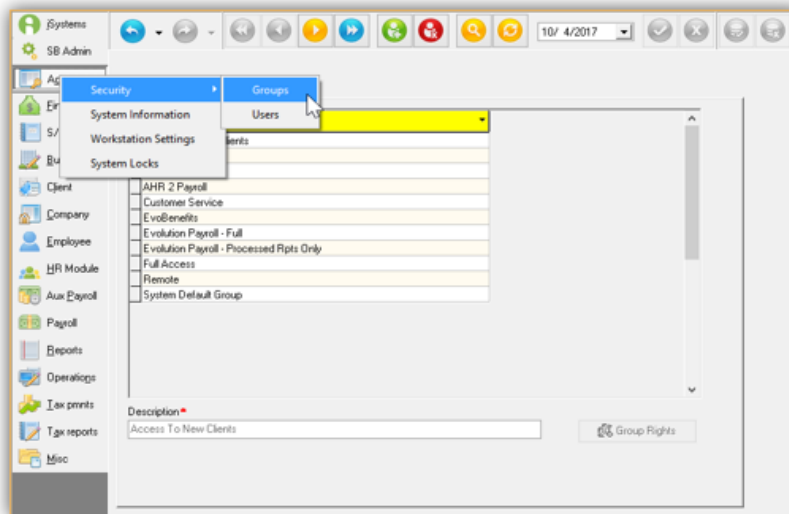
Client User Setup

Once Evolution has been updated to the Stowe release, you will need to create and link client users to the three new security groups.

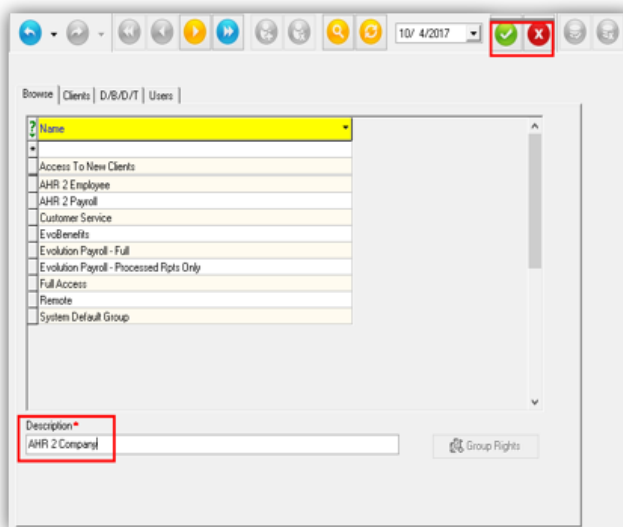
AHR 2.0 Security Groups Setup

HR Security Templates have been added to Evolution Classic. These are also the name of the security groups, and will need to be created. With each group, comes default user rights that allow different levels of access.

Creating AHR 2 Security Groups in Evolution Classic and assigning them to users, allows you to assign specific functionality to users based on their access needs and job responsibilities.



To create a Security Group in Evolution Classic, Go to the **Admin-Security-Groups-Browse** tab. Click on the green **Plus Sign** to create a new record:



Enter the name of the group exactly as shown here:

- AHR 2 Company
- AHR 2 Employee
- AHR 2 Payroll

Post and **Commit** your changes.

Security Groups must be created in Evolution Classic to be assigned to Users. The Groups **MUST** be named as they are above.

All Current Evolution Classic or Evolution Payroll users who will access Advanced HR 2.0 must be assigned the group or groups that fit their job duties.

After creation, you'll need to assign them to users.

When creating groups, it's important to name them exactly as you see them below.

1. To create a Security Group in Evolution Classic, go to the **Admin - Security – Groups- Browse** tab.

Browse | Clients | D/B/D/T | Users

? Name

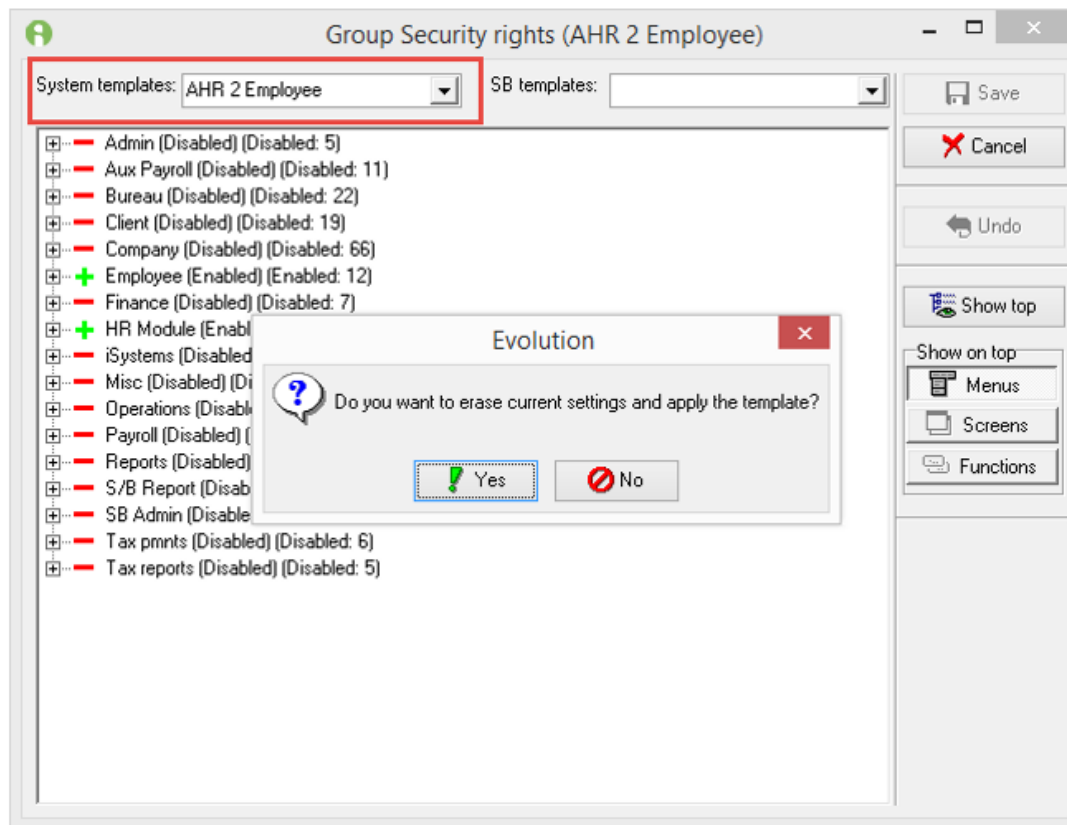
- Access To New Clients
- AHR 2 Company
- AHR 2 Employee
- AHR 2 Payroll
- Evolution PR - Processed Reports Only
- Evolution PR- Full
- Full Access
- Remote Access - Classic
- SB Customer Service
- SB EvoBenefits
- System Default Group

Description *

AHR 2 Employee

Group Rights

2. Click on the plus sign to create a new record.
3. Enter the name of the group EXACTLY as the Security Templates are named:
 - AHR 2 Company**
 - AHR 2 Employee**
 - AHR 2 Payroll**
4. Click on **Post and Commit**.
5. Click on the **Group Rights** button.
6. Select the AHR template from the **System Template** dropdown.
7. Click on **Yes** when the system asks if you want to apply the template.
8. **Save** and repeat the previous steps until all 3 security groups have been created.



Note: The **AHR 2 Payroll** template does not include the rights to **Submit Payroll** or **Directly Process Payroll**. These must be defined by each Service Bureau individually.

The **AHR 2 Payroll** Group will need to be adjusted to give the group the minimum rights that YOUR Service Bureau allows for users. Remember that neither **Submit Payroll** or **Directly Process Payroll** are currently selected. Update the Security Functions as prescribed by YOUR bureau's process with your client's need for access.

1. Next, assign the **AHR 2 Payroll Group** to users. On the **Admin - Security - Users - Groups** tab, highlight the newly created group and click **Add**.
2. Add the groups that this user will need access to.
3. **Post and Commit** when complete.

Browse | Details | **Groups** | Clients | D/B/D/T |

Available groups

?	Group name
▶	Access To New Clients
	Evolution PR - Processed Reports Only
	Evolution PR- Full
	Full Access
	Remote Access - Classic
	SB Customer Service
	SB EvoBenefits
	Test Group

Assigned groups

?	Group name
	AHR 2 Company
	AHR 2 Employee
▶	AHR 2 Payroll
	System Default Group

Add

Remove

These groups **MUST** be added to your Internal Service Bureau Staff that will access Advanced HR 2.0, as well as your clients that will access Advanced HR 2.0.

Payroll and Service Bureau User Email Address

Evolution Classic user email addresses are required for all **users** when **Evolution Single Sign On** is activated. While managing security groups, this is a good time to ensure that all users have an email address listed on their user detail record.

1. Go to **Admin – Security – Users - Details**.
2. Make sure the **Email Address** field is populated as shown below.

The screenshot shows the 'Details' tab for a user named 'Will Roberts'. The 'E-mail Address' field is highlighted with a red box and contains the text 'Will.Roberts@A...'. Other fields visible include 'User ID' (Will), 'Last Name' (Roberts), 'First Name' (Will), 'Initial' (empty), 'Active User' (Yes), 'Password', 'Confirm Password', 'Password Change Date' (11/1/2019), 'Security Level' (Administrator), 'Department' (Customer Service), 'Analytics Personnel' (N/A), 'User's stereotype' (S/B internal), and 'AHR User Type' (SuperAdmin).

Employee Email Addresses

Employees must also have a valid, unique email address entered in the **Employee – Employee, Self-Serve, Settings** pane in Evolution in order to access the Employee Self Service and their **Employee Dashboard**. These will become the **Usernames** for the employees in Advanced HR 2.0.

The screenshot shows the 'Settings' pane. Under the 'Annual Returns' section, there are radio buttons for 'Form On File' (Yes/No) and a 'Format' dropdown (Both). Below this, the 'E-mail' field is highlighted with a red box and contains the text 'red@unknown.com'. The 'Benefits E-mail' field is empty.

The employee's unique email address should be entered into Evolution Classic prior to the Payroll Data Cutover. This can be done using EvoExchange. If the email address is not added prior to the Payroll Data Cutover, users will have to manually populate the email prior to enabling the Employee for Self Service.

Verifying Pay Rate Information

For those employees who have **Alternate Pay Rates**, you will need to verify that the **Pay Rate Number** follows a logical pattern. This pattern should be in a **1,2,3...** format:

In our example to the left, you can see the recommended **Pay Rate Number** format:

#1 being the **Primary Rate**
#2 being the **Secondary Rate**
#3 being the **Tertiary Rate**

If the Rate Number is not in this format, this information will not be consistent between Evolution Classic and Advanced HR 2.0. The consequence could be errors arising when running payrolls.

Enabling Single Sign On

Once you have updated to the Stowe version of Evolution, contact Evolution Support to create a Support ticket and start the process of enabling your Single Sign On functionality.

- Contact Evolution HCM Support
 Support@evolutionhcm.com
 802-655-8347 Ext 3
- A non-billable case will be created
 - SaaS customers – Evolution HCM IT/Network Operations team will perform the maintenance necessary to turn on SSO
 - Self-hosted customers – You will be provided with instructions on how to run the process to turn this on at your bureau.

It is important to note that SSO functionality is for those users who need to access payroll functions AND Advanced HR 2.0 functions.

For those users who only need Advanced HR 2.0 access, they will login as normal, and do not need SSO functionality, although they also use the new Evolution login screen.

For Self-hosted customers, you will be provided with instructions on how to run the process to turn this on at your bureau.

When ready, contact Support and a non-billable case will be created.

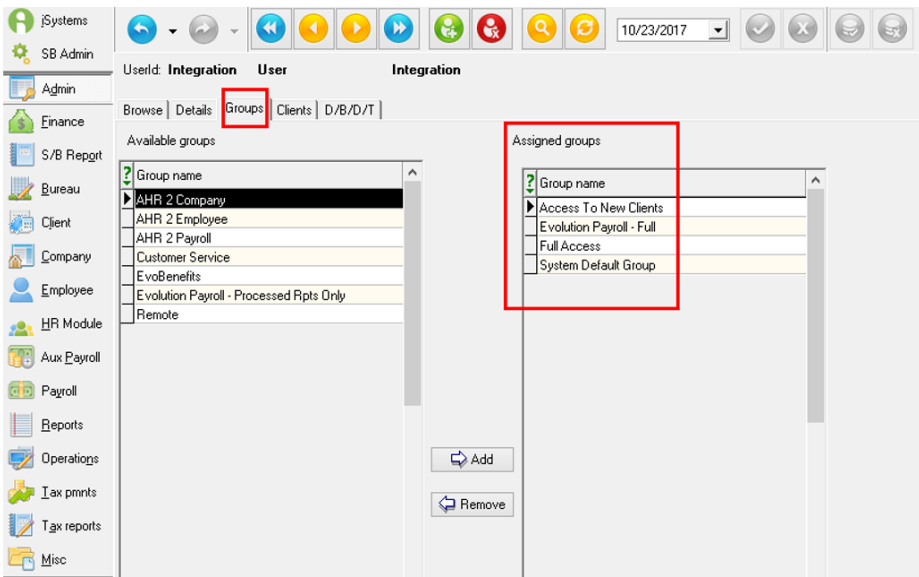
Creating a Service Account User in Evolution Classic

Create a **Service Account User** in Evolution Classic. 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. This account should be set to **Full Access**.

The screenshot shows the 'User' creation form in the Evolution Classic application. The 'User ID' is set to 'Integration'. The 'Last Name' is 'User', 'First Name' is 'Integration', and 'Initial' is empty. The 'E-mail Address' is 'IdoSSO@Sharklasers.Com'. The 'HR Personnel' checkbox is checked. The 'Password Change Date' is set to '12/16/2099'. The 'Security Level' is set to 'Administrator'. The 'Department' is 'Customer Service'. The 'User's stereotype' is 'S/B internal'. The 'AHR User Type' is set to 'SuperAdmin'. The 'Active User' checkbox is checked. The 'Password' and 'Confirm Password' fields are empty. The 'User Signature' field is empty. The 'Accountant' dropdown is empty. The 'User rights' button is visible at the bottom right.

Service Accounts are best created by users who have full access to Evolution Classic. To create the account, create a new user in **Admin – Security – Users**. Click on the green + Sign to create a new user. Follow the instructions below to create this integration user account.

- The Service Account User should have a unique **User ID** and must be 4 or more characters
- Set the **Security Level** to **Administrator**
- Set the **AHR User Type** to **SuperAdmin**
- Set the **Password Change Date** to **12/31/2099** (or some other date far out into the future)



On the **Groups** tab, Assign the **Full Access** and **Access to New Clients** Group.

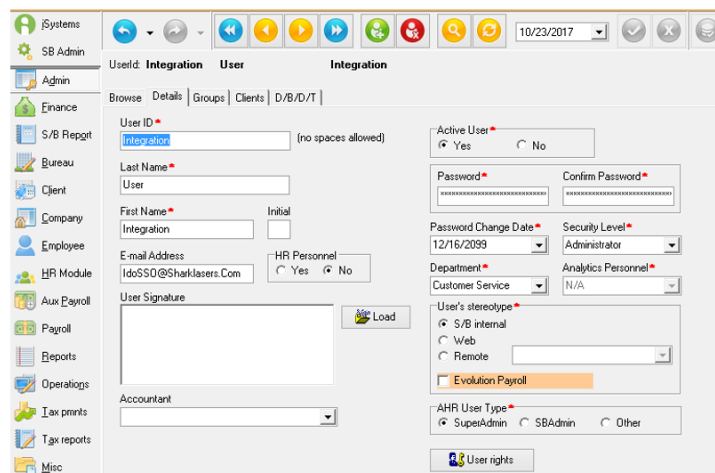
If your Full Access group has been modified, update the user rights for this User ID to have Full Access.

Once the Service Account User has been created, log into Evolution with this Service User Account and set up any Security Questions.

Important! This is a “Non-User” Account. Do not use this **Service Account** for other purposes than Enabling SSO. Do not log into Systems with this account once Security Questions have been defined.

If the Service Account User becomes locked at any time this will impact your ability to log in with Evolution Single Sign On.

This is why this account is not a person and should not be changed in any way after its been created.



Evolution Support will send you a URL and a Verification code that you will need to enable the newly created Service Account User for Single Sign On. Once you receive a success message enabling the Service Account, contact Evolution for turning on SSO.

The following Evolution Classic setup items are also implementation dependencies that need to be done **prior to** the Payroll Data Cutover.

Future Dated Fields

Future Effective dates in a number of fields do not correctly flow from Evolution Classic into Advanced HR 2.0. Only the current date will flow over during the [Payroll Cutover process](#). It is best practice to clean this data up prior to running the Payroll Cutover process.

The **AHR 2.0 Onboarding Validation report (S3550)**, will identify future effective dated fields based on the targeted Payroll Cutover date. The following fields will be searched and need to be corrected if they have a future effective date assigned.

Future Dated Fields:

- Name (First, Last, Middle Initial)
- SSN
- Status Code
- Salary / Rates
- DBDT
- Default Worker's Comp Code

AHR 2.0 Payroll Cutover Validation Report

- Enter the scheduled Payroll Cutover date in the report parameters
- Save the Report – you will need this for data entry after Payroll Cutover
- Delete the future Effective dates listed on the Report. All fields that populate on the report will need to be updated.

For example: Salary is set to a future effective date of 11/01/2017.

Right-click on the **Salary Amount** field in Evolution Classic, **Effective Period**.

As-Of-Date values of EE.SALARY_AMOUNT (nbr=6)

Begin Effective Date	End Effective Date	Salary Amount
1/1/1900	10/31/2017	3,000.00
11/1/2017	12/30/9999	3,056.80

Begin Effective Date: 11/1/2017 End Effective Date: 12/30/9999 Salary Amount: 3,056.80

Create Delete OK Cancel

Highlight the future effective date, then select **Delete**. This will remove the future effective date from the field.

Keep a copy of the AHR 2.0 Onboarding Validation report (S3550) that has the Future Effective dated fields. You will need this report after the Payroll Cutover in AHR 2.0, to then manually reenter this data as needed.

Refer to [Appendix 1: Effective Date Fields List and Onboarding Validation Report \(S3550\)](#) in this guide for more information about this important Pre Payroll Cutover task.

Employee Positions

For use in Advanced HR 2.0, employees must have a position assigned to them. The **Position** field from Evolution Classic, under **Employee – Employee, Details** currently does NOT flow from Evolution Classic into Advanced HR 2.0.

The positions can be specific or a generic space filler position. Gather this information before starting your Payroll Cutover. Once the [Payroll Cutover](#) has completed, you can create the Positions in Advanced HR 2.0 in the **Company Setup – Position** screen, and then assign the position to the employee records in the **Employee Maintenance – Employee Detail** screen.

Tax Forms and W-2

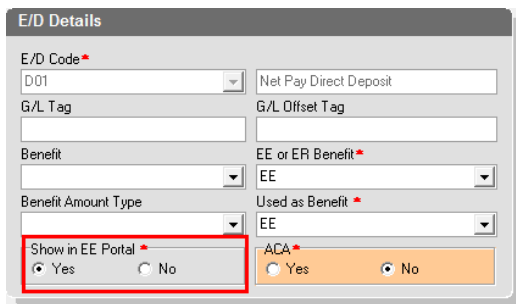
In order for W-2 and other Tax forms to show in the Employee Self Service in Advanced HR 2.0, the settings in the **Annual Returns** section of the **Employee – Employee – Self Serve** tab in Evolution Classic must be updated to:

- **Form on File - Yes**
- **Format - Both or Electronic**

Note: Form on File means that you have received consent to supply the employee's W-2 electronically instead of a paper copy.

E/D Codes

Prepare the Scheduled E/D codes for use in Advanced HR 2.0 **before** the Payroll Data Cutover is executed. In Evolution Classic, go to the **Company – E/Ds – Details** tab. Find the E/Ds that will be used in Advanced HR 2.0 for Direct Deposit and Benefits (both for Employee and Employer contributions). On these E/Ds, you need to set the **Show in EE Portal** option to **Yes**. It is best practice that all the E/D codes are designated in this manner.

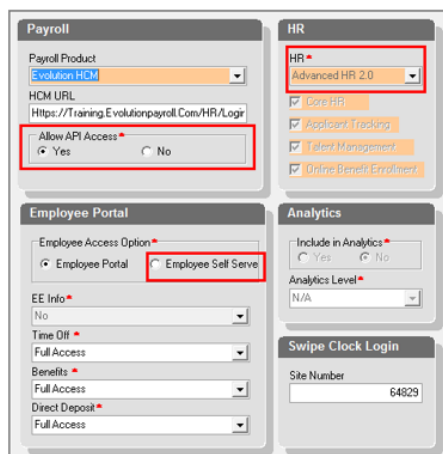


Company Info

You need to update Company information in Evolution Classic that will enable access.

Go to the **Company – General – Company Info – Payroll Products** tab and update the following fields:

- **Payroll Product – Evolution HCM**
- **HCM URL** – Enter the Advanced HR 2.0 URL
- **Allow API Access** – This option needs to be set to **Yes** for any users other than a Super User to be able to see the company in the Payroll Cutover company list.



To update company information, go to **Company - General- Company Info - Payroll Products** tab and update the following fields:

1. The **Payroll Product** needs to be set to **Evolution HCM**.
2. The **HCM URL** is your Advanced HR 2.0 URL.
3. **Allow API Access** is set to **Yes**.
4. To allow employees access to request time off, the **Employee Self Serve** option button should be selected.
5. Once the Payroll Data Cutover is completed, the **HR** dropdown will automatically be set to **Advanced HR 2.0**. Remember, that after the cutover, the employee fields that have been migrated over will be locked down in Evolution Classic.

Creating Bookmarks for AHR or Evolution Payroll Logins

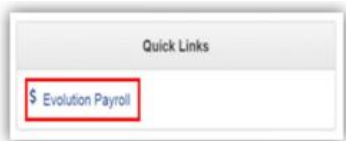
Administrators should make all users aware of the following tip if they are creating bookmarks in their browser to log into Advanced HR 2.0 and Evolution Payroll.

We recommend that users do not create the bookmark in their browser until after they are past the Single Sign On (SSO) login screen and are actually in the system. The reason for this is creating a bookmark at the SSO login screen may not work due to the redirection task that this feature performs behind the scenes. Have users create a bookmark once they are in the system and the browser should save the correct URL.

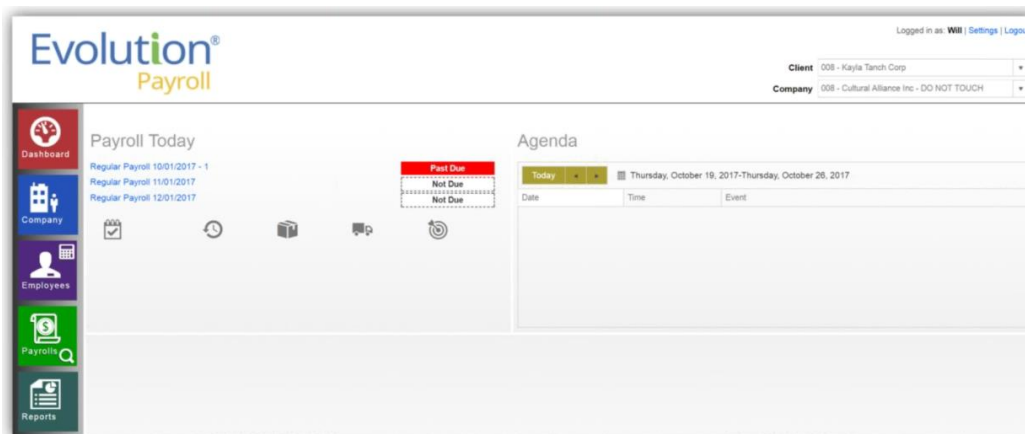
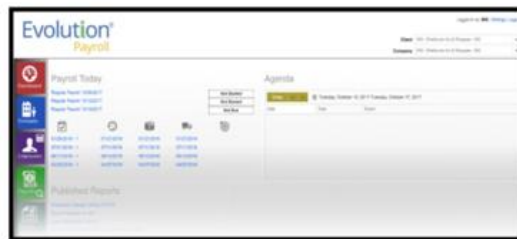
End Result of Single Sign On - Moving between Advanced HR and Evolution Payroll

With Evolution Single Sign On activated, the user has the ability to easily switch to Evolution Payroll and back again. As long as they have the Payroll Permissions to do so. The important thing to remember is that the user needs the appropriate Security Roles assigned to them, including access to Evolution Payroll and Evolution Single Sign On.

Go to **HR Admin – Quick Links – Evolution Payroll**.



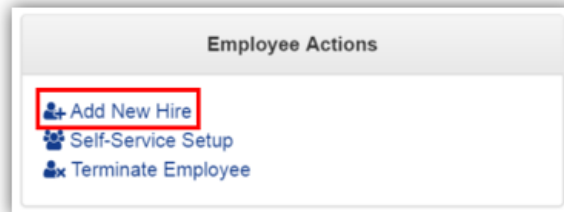
When clicked, a new browser tab will automatically open for your **Evolution Payroll** environment.



The user can now utilize any payroll function that they would normally have access to.

Creating New Users in Advanced HR 2.0

Now, let's review the process for creating new users. These new users could be a new employee, or existing employee, that has been given access to payroll (possibly through promotion).



Go to **HR Admin-Employee Actions**.

 A screenshot of the 'New Hire Process' wizard, specifically 'STEP 1 - Type of Hire'. The form includes fields for 'Company' (Shelburne Farms CO (SP10)), 'Tax Form (Type of Hire)' (W2 - Employee), 'Hire Date' (10/13/2017), 'Position' (Trainer - Trainer), and 'Employee ID' (15). A blue button at the bottom right is labeled 'Let's begin new hire' and is highlighted with a red rectangular box.

When **Add New Hire** is clicked, the New Hire Process wizard will open.

Please note that if an employee already exists, you'll need to go to the **User List** screen to create a new one.

As part of Onboarding, it is highly recommended that you create a user while you are entering the preliminary information for the New Hire.

Scroll down to the **User** section of the **Add New Hire** wizard and click the blue **Quick Add User** button:

 A screenshot of the 'User' section within the 'Add New Hire' wizard. It features a search bar labeled 'Select existing user (type to search)' with a placeholder 'type to search'. Below the search bar is a blue button labeled 'Quick Add User', which is highlighted with a red rectangular box.

The **Quick Add User** popup allows you to add a user to the system with the most important fields:

- Create Username
- Edit Contact info
- Send a Welcome Email
- Assign a Role

Assign a Role at this time. This will allow the new hire 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 hire how to access Self Serve Onboarding. For our purposes here, however, the toggle for the Welcome Email should be set to **No**. Since they are not actually approved for hiring yet, it may be premature to send a welcome email.

The next step is to assign access to Evolution.

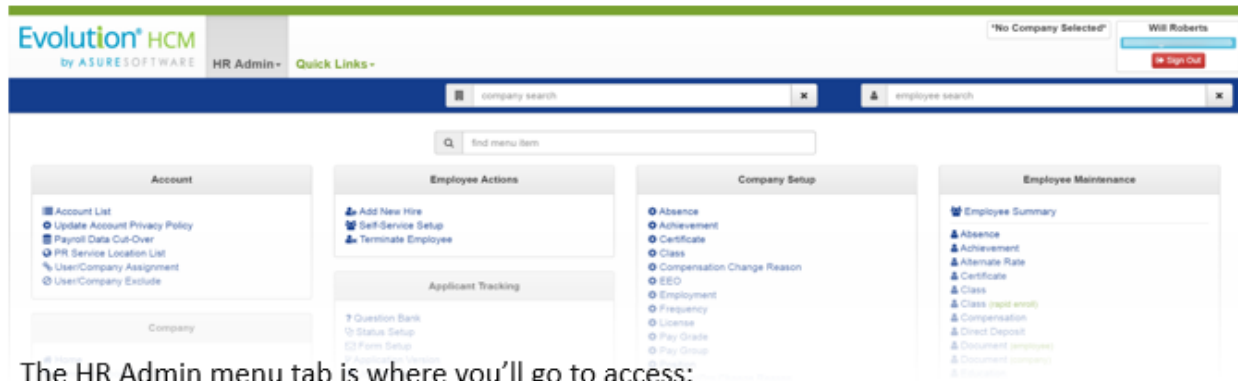
Go to **HR Admin – Company - User List** and select the user.

This will let Evolution know that they are an **Evolution User** as well.

This access corresponds with the **AHR 2 Security Groups** that were created in Evolution Classic.

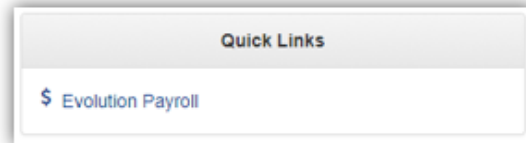
HR Admin Menu Items

Now that you know how to navigate around Advanced HR 2.0, let's go through the individual **HR Admin** menu items and show you what you can see and the tasks that you can perform as an Administrator.

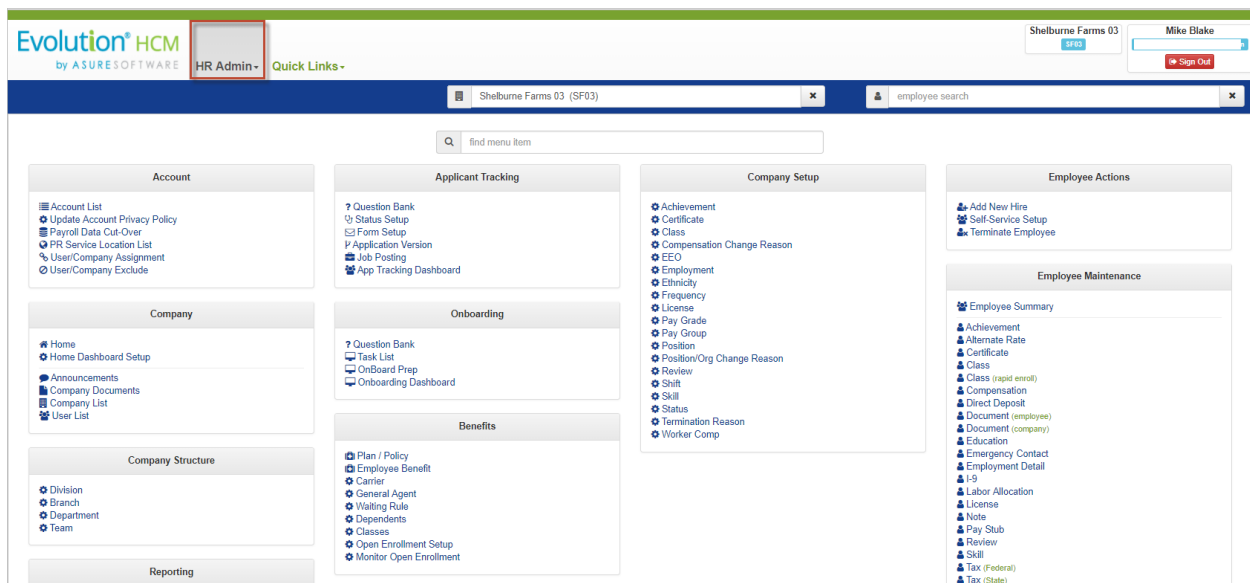


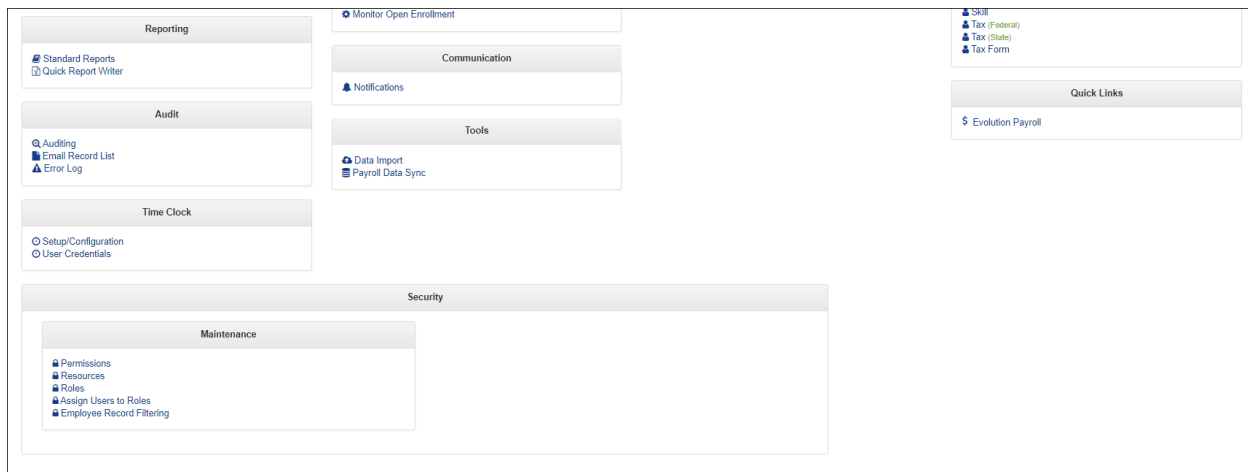
The HR Admin menu tab is where you'll go to access:

- Account and Company Setup.
- User and Employee information and maintenance.
- Applicant Tracking and New Hire Onboarding.
- Benefits management.
- Reporting.
- Time Clock integration.
- Security Roles.
- Evolution Payroll



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





HR Admin menu

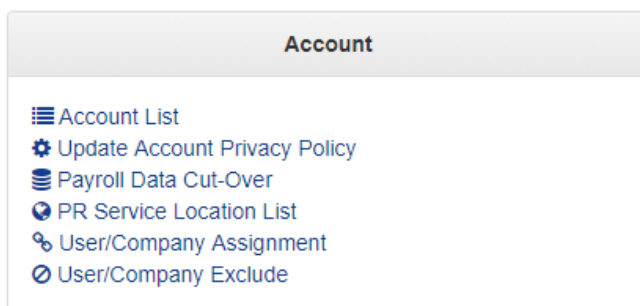
Note: Employee users should refer to the separate document *Advanced HR 2.0 Employee Self Service User Guide* to see how these screens configured by the administrator look from the employee point of view. The *Employee Self Service User Guide* does not contain the configuration and setup information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

Also note that the screens contained in the **Employee Maintenance** sub menu of **HR Admin** are discussed in the separate *Advanced HR 2.0 Employee Maintenance Guide*.

Account Menu

Use the **HR Admin – Account** menu to do the following actions:

- Verify Account Info
- Create contact information
- Add Payroll Service
- Add a logo
- Payroll Integration information



PR Service Location List

The PR Service Location List menu item (this may be done by Evolution during licensing).

In order to cutover data from Evolution, you will first need to path your Advanced HR system to your Evolution database. Items needed for this process:

- Service Location URL
- Authentication Key
- SSO URL

Select **New** from the **HR Admin – Account, PR Service Location List**. Select **Account Evolution Implementation Demo and PR Platform EVO – iSystems Evolution**.

The **Service Location URL**, **Authentication Key** and **SSO URL** information will be provided to you by Evolution. Once you have entered the above information, save your changes.

Note: Once this is complete you will not need to set this up again. You will not be able to onboard any clients until this step has been completed.

Account List

Use the **Account List** menu item to verify that your contact information is accurate and to add your logo and any other Service Bureau information. Your Evolution Payroll Platform should already be setup in the **PR Service Location**.

Go to HR Admin – Account – Account List

- Click on your Account
- Ensure that the Contact Information is accurate
- Upload the Service Bureau Logo in the Account Logo section

Account Info	
Account Name	iSystems
Create Date	04/19/2017 12:53 PM
Active	<input checked="" type="checkbox"/> Yes
Default Account for URLs (separate with semi-colon) i@ms.ehcm.com ; i@ms.evolutionhcm.com ; i@ms.evolutionadvancedhr.com	


Contact	
First Name	
Last Name	
Email	i@ms.ehcm.com
Bus Phone	123.456.7890 x123
Cell Phone	123.456.7890 x12345

Payroll Service	
Service Locations	
Service URL	https://api.taging-evolution-software.com/v3/api/bureaus/hrintegration
Description	Evolution V3

Account Logo (only .JPG, .PNG, and .GIF extension files allowed here)			
Already Attached			
These documents are already attached to this record.			
Download	Filename	Size (KB)	Upload Date
	logo_evolution_90x270.png	4	08/01/2017


Note: The Service Bureau logo file size should be no larger than 90 pixel height by 320 pixel width.

Go to **HR Admin – Account – Account List**.

Account List 

[+ New](#)
[Download](#)

[Advanced Filter](#)

Actions	Account Name	Active	Create Date	URLs	Email	Cell
	iSystems	No Yes	04/19/2017 12:53 PM	isystems.hrnext.com ;isystems.evolutionhcm.com ;isystems.evolutionadvancedhr.com	ilanuel@evolutionhcm.com	

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

To open your account, click on the service bureau name to add or edit the account information.

HRnext Account: iSystems

Account Info

Account Name

Create Date Eastern

Active
No Yes

Default Account for URLs (separate with semi-colon)

Contact

First Name

Last Name

Email

Bus Phone

Cell Phone

Payroll Service

Service Locations

filter grid...

Service URL	Description
https://apistaging.evolution-software.com/v3/api/bureaus/hrintegration	Evolution V3



Page 1 of 1 Item 1 to 1 of 1

When uploading the Service Bureau logo, keep it small and simple. The File size should be no larger than **90 pixel height by 320 pixel width**.

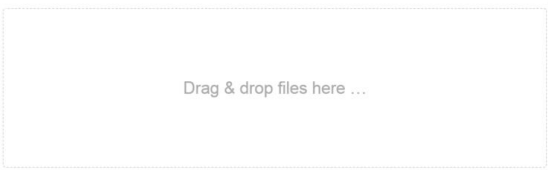
Account Logo (only JPG, PNG, and GIF extension files allowed here)

Already Attached

These documents are **already attached** to this record.

Download	Filename	Size (KB)	Upload Date
	Evolution Asure Logo.png	10	08/07/2017 


Browse or Drag/Drop documents



Drag & drop files here ...

[Browse ...](#)

Temporarily Uploaded Documents



Either use the **Browse** function to upload from your computer, or you can just drag and drop your logo into the box. Please note that the system will take any size logo that you upload. But remember to keep the logo size to the pixel size recommendation above and also keep the file size small as well. If you post a large file size logo, that will significantly impact system performance as it loads the logo on every page.

Note: Be sure to contact the Asure Software Product Support if any information in the Account screen is incorrect.

The **Integration** section of the Account is where you set any Service Bureau parameters that are specific to Payroll. Information on the section of the screen should be taken care of for you through the implementation.

Integration

Payroll Options

Service Bureau ID

Service Bureau ID

Prenote Default (Direct Deposits)

No

Yes

Benefits

3rd Party

Integration Info

Diagnostics

HR AnswerLink

Affiliate ID

Affiliate ID

Subdomain

Subdomain

Think HR

Authentication Key

Authentication Key

Shugo

Affiliate Key

wroberts@evolutionhcm.com

Affiliate Password

Evo SSO

Application/Tenant ID

Application ID

23e69dde-2260-4def-9032-08360435e210

Tenant ID

c807d7f9-b391-4525-ac0e-31dbc0ct202b

API/Secret Keys

API Key

QUHSOI0UZXZVBHV0AW9U

Secret Key

URL

SSO JWT URL

https://apistaging.evolution-software.com/identity/sso/?jwtRec

Payroll URL

https://apitest.evolutionpayroll.com/hcm/home/ssocalback?a

SMTP Configuration (If "Server Address" is not empty, all of these values will be used.)

Connection

Server Address

smtp.postmarkapp.com

Server Port

25

Use SSL

No

Yes

Credentials

Username

7d5e86cb-848f-4870-8a71-eb04f05b4a86

Password

From Addresses

System Address

AdvancedHR@asuresoftware.com

Reports Address

AdvancedHR@asuresoftware.com

Click **Save Changes** when done.

You should also go to **Security – Maintenance – Roles** to verify your default Security Roles:

- Base User
- Base Manager
- Base Admin

Even “Out of the Box”, the Service Bureau will have base Security Roles to use to clone or add to users. Security Roles are what Advanced HR 2.0 uses to allow access to different functionality.

SMTP Email Communications

Email communications are sent from AHR 2.0. The name on the email is Advanced HR using the email address AdvancedHR@asuresoftware.com

The from name (Advanced HR) and the username of the email address can be customized if you wish. The @asuresoftware.com, of the name@asuresoftware.com address, cannot be changed. The configuration change is applied to all clients under the Service Bureau.

Any updates to this information needs to be reviewed with Asure. Your Implementation Specialist will be able to assist if with these updates.

From name: _____

Email: _____@asuresoftware.com

Company Menu

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

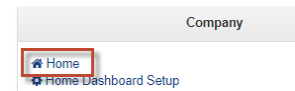
Once the company has been onboarded to Advanced HR 2.0, there is some setup that is required. The company setup is done in two locations:

- **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

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

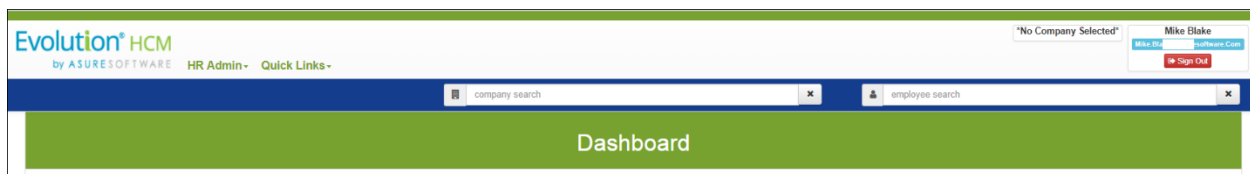
Home

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 login to Advanced HR 2.0. When logged 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 log 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. For example, a **Base User** (which is the lowest user role) has the ability to see the following:

Base User sees:

- 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 User** and **Base Manager User** has the ability to see:

Base Admin & Base Manager see:

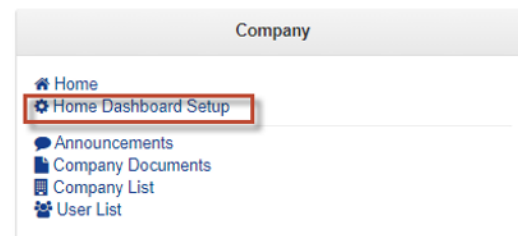
- Company Announcements
- Upcoming employee Birthdays and Anniversaries
- Employee Certificate and License Expirations
- Employee Scheduled Reviews

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.

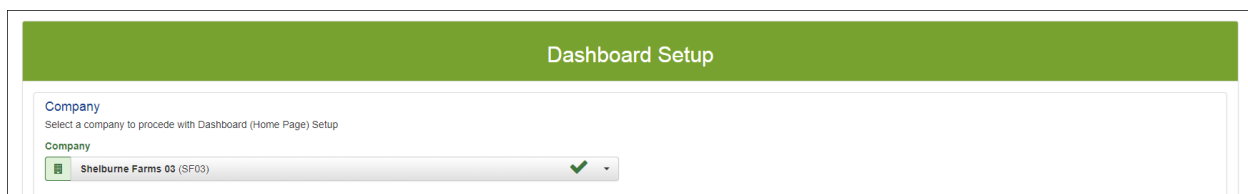
Company Dashboard Setup

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 the Admins and Employees roles.

Dashboard Settings
Complete each section and setting

Admin: Toggle sections (ON=Green/Yes)

No	Yes	Announcements
No	Yes	Birthdays (admin)
No	Yes	Certificate Expirations (admin)
No	Yes	License Expirations (admin)
No	Yes	Scheduled Reviews (admin)
No	Yes	Time Off Requests (admin)
No	Yes	Anniversaries (admin)

ESS: Toggle sections (ON=Green/Yes)

No	Yes	My Time Off/Balance (ESS)
No	Yes	My Upcoming Reviews (ESS)
No	Yes	Review Acknowledgement Icon (ESS)
No	Yes	My Upcoming Classes (ESS)
No	Yes	Class Acknowledgement Icon (ESS)
No	Yes	My Expiring Certifications (ESS)
No	Yes	Certificate Acknowledgement Icon (ESS)
No	Yes	My Expiring Licenses (ESS)
No	Yes	License Acknowledgement Icon (ESS)

Other Settings

Future Period to Review (months):
5

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

Make the Dashboard settings for the Employees roles in this section

In the Dashboard Settings tile, it's important to note that for the various categories, if they're 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).

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** section of the screen.

Admin: Toggle sections (ON=Green/Yes)		
No	Yes	Announcements
No	Yes	Birthdays (admin)
No	Yes	Certificate Expirations (admin)
No	Yes	License Expirations (admin)
No	Yes	Scheduled Reviews (admin)
No	Yes	Time Off Requests (admin)
No	Yes	Anniversaries (admin)

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.

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:

Other Settings
Future Period to Review (months)
6

Set a Review Period in months.

You can set how far into the future you want the system to look.

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.

ESS: Toggle sections (ON=Green/Yes)

No	Yes	My Time Off/Balance (ess)
No	Yes	My Upcoming Reviews (ess)
No	Yes	Review Acknowledgement Icon (ess)
No	Yes	My Upcoming Classes (ess)
No	Yes	Class Acknowledgement Icon (ess)
No	Yes	My Expiring Certifications (ess)
No	Yes	Certificate Acknowledgement Icon (ess)
No	Yes	My Expiring Licenses (ess)
No	Yes	License Acknowledgement Icon (ess)
No	Yes	Show Payroll Summary Quick Link as Landing Box (ess)

Set **Acknowledgement** functionality for the **Employee's Dashboard** by using the **Yes/No** toggles.

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.

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

Certificate Expirations

No Certificates expiring in upcoming months

License Expirations

No Licenses expiring in upcoming months

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

Base User Role Company Dashboard

The screenshot shows the Base User Role Company Dashboard. The top navigation bar includes the Evolution HCM logo, a 'My HR-' dropdown menu, and user information for Megan Forsyth. The main dashboard area is titled 'Dashboard' and contains several sections:

- Company Announcements:**
 - Employee Dinner Cruise - 10/2/2017:** A way of saying "Thank You" for all your hard work, the Executive Team would like to invite you and a guest to take part in a dinner cruise on beautiful Lake Champlain. The cruise will leave from Pier #2 at 6pm on October 15th. The Executive Team
 - Food Drive - 8/16/2017:** Over the next month we'll be collecting donations for our local food bank. They secure and distribute 4 thousand meals each year through food pantries and meal programs throughout the state and lead the nation to engage in the fight against hunger. Please leave your non-perishable donations in the employee kitchen.
- My Time Off - Forsyth, Megan (1):** No upcoming time off
- My Upcoming Reviews - Forsyth, Megan (1):** No Reviews in upcoming months
- My Upcoming Classes - Forsyth, Megan (1):**

Class Date	Employee	Type	Acknowledge
11/01/2017	Forsyth, Megan (1)	Cheese Making in the 21st Century	

Base Manager Role Company Dashboard

The screenshot shows the Base Manager Role Company Dashboard. The top navigation bar includes the Evolution HCM logo, a 'My HR-' dropdown menu, and user information for Megan Forsyth. The main dashboard area is titled 'Dashboard' and contains several sections:

- Company Announcements:**
 - Employee Dinner Cruise - 10/2/2017:** A way of saying "Thank You" for all your hard work, the Executive Team would like to invite you and a guest to take part in a dinner cruise on beautiful Lake Champlain. The cruise will leave from Pier #2 at 6pm on October 15th. The Executive Team
 - Food Drive - 8/16/2017:** Over the next month we'll be collecting donations for our local food bank. They secure and distribute 4 thousand meals each year through food pantries and meal programs throughout the state and lead the nation to engage in the fight against hunger. Please leave your non-perishable donations in the employee kitchen.
- Birthdays:**

Birthday	Employee
November 20	Smithers, Jackson (13)
February 8	Webb, Chick (7)
- Certificate Expirations:** No Certificates expiring in upcoming months
- License Expirations:** No Licenses expiring in upcoming months

Base Admin Role Company Dashboard

The screenshot shows the Evolution HCM Base Admin Role Company Dashboard. The top navigation bar includes the Evolution HCM logo, a user profile for Boris Dyer, and a 'Sign Out' button. The main dashboard area is divided into several sections: 'Company Announcements' (featuring 'Employee Dinner Cruise' and 'Food Drive' announcements), 'Birthdays' (listing employees and their birthdays), 'Certificate Expirations' (showing no certificates expiring), and 'License Expirations' (showing no licenses expiring). The 'HR Admin - My HR - Quick Links' menu is highlighted in the top navigation bar.

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**:

The screenshot shows the 'Company' sidebar menu. The 'Announcements' option is highlighted with a red box. Other options in the menu include Home, Home Dashboard Setup, Company Documents, Company List, Payroll Data Sync, User List, and Email Record List.


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


The screenshot shows the 'Announcements' page. It features a 'New' button and a 'Download' button. Below these is a table with the following columns: Actions, Post Date, Title, On, High Priority, and Expire Date. The table contains two rows of announcements:







Actions	Post Date	Title	On	High Priority	Expire Date
	08/16/2017	Open Enrollment	No Yes	No Yes	
	08/16/2017	Food Drive	No Yes	No Yes	

It's important to note that 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 being presented at the top of the list. You also have the ability to 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.

Announcements 

[+ New](#)  [Download](#)

Actions	Post Date	Title	On	High Priority	Expire Date
	10/02/2017	Employee Dinner Cruise	No Yes	No Yes	
	09/08/2017	Company Picnic	No Yes	No Yes	10/08/2017
	08/18/2017	Message from our CEO	No Yes	No Yes	
	08/16/2017	Open Enrollment	No Yes	No Yes	
	08/16/2017	Food Drive	No Yes	No Yes	
	08/08/2017	Bowling night	No Yes	No Yes	

Page: 1 of 1 Go Page size: 6 Change Item 1 to 6 of 6

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. You can easily create and customize any announcement that will appear on all the employee Dashboards.

Announcement: NEW RECORD

Company

Company
Please Choose (represents BLANK)

Status

Announcement On (shown)
No Yes

High Priority
No Yes

Dates

Post Date
10/16/2017

Expiration Date
Expiration Date

Announcement Posting

Title
Title

Detail

You can even add documents, pictures, and video links!

Images (only JPG, PNG, and GIF extension files allowed here)

Already Attached


These documents are already attached to this record.

Download	Filename	Size (KB)	Uploaded
	Picnic.jpg	82	08/02/2017

To create a new announcement:

1. Go to **HR Admin – Company – Announcements**.
2. The system displays the **Announcements** screen. The screen shows a display 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 also have the ability to 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	
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.

Field / Button	Description
Status	
Announcement On	Click on the No / Yes toggle buttons to set if the announcement should currently display or not.
High Priority	Click on the No / Yes toggle buttons to set if the announcement should be a high priority or not. Selecting High Priority displays the announcement at the top of the list.
Dates	
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	
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.

The following screenshot shows a completed **Announcement** screen.

Announcement: NEW RECORD

Company

Company

 MB Winery (MB01) ✓

Status

Announcement On (shown)


No Yes

High Priority


No Yes

Dates

Post Date

10/09/2017 

Expiration Date

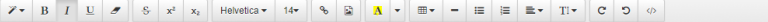
Expiration Date 

Announcement Posting

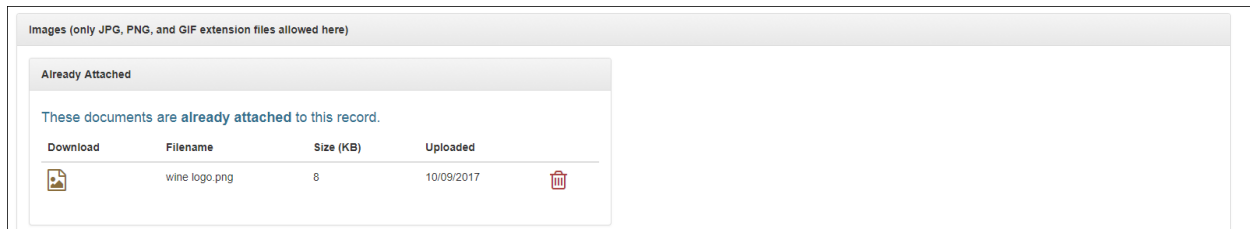
Title

Fourth of July Company BQ ✓

Detail

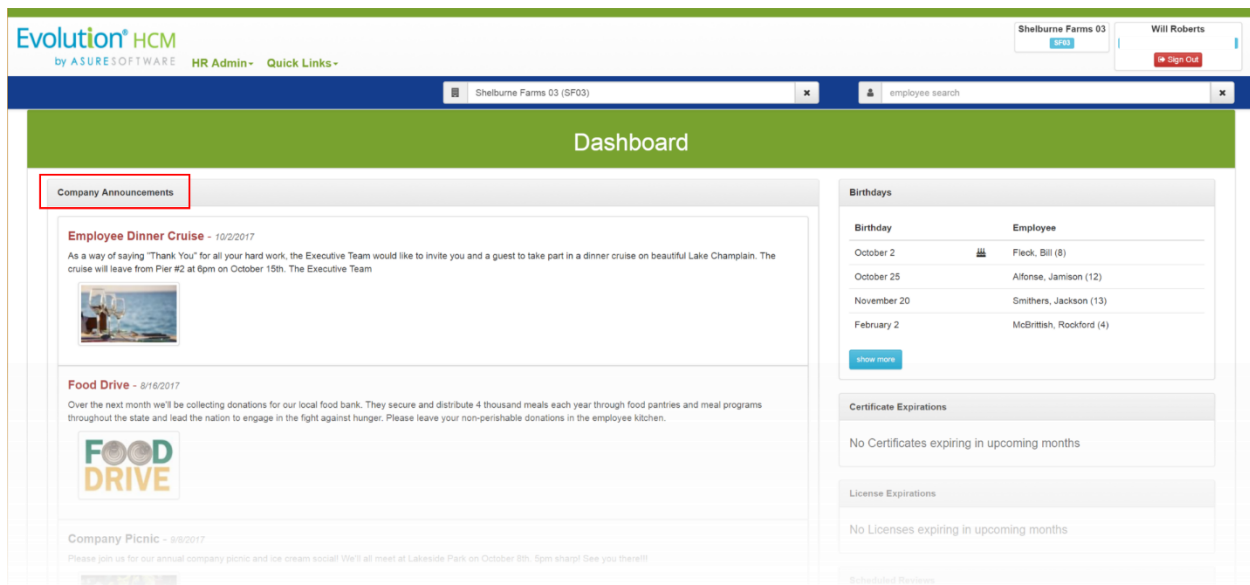


Come celebrate the **Fourth of July** at our company picnic on **Monday July 3** from 11:00 AM to whenever the food runs out. To be held at the patio area behind the building. *Food and Fun for all - bring the family.*



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.

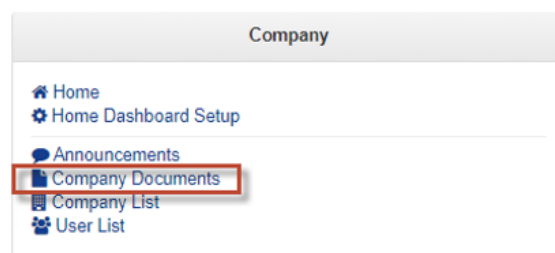


Company Announcements Display on the Dashboard for employees

Company Documents

Users can upload and view 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**

Company Documents

+ Add Documents Download

filter grid...

Actions	Company	Download	Filename	Category	Title	Published to Employee	Upload Date	Size (KB)	Upload By
	MS Winery		fourth of july.png	Announcement	Fourth of July Company BBQ	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	05/25/2017 09:03 AM	11	mblake@evolutionhcm.com
	MS Winery		MS Winery Company Handbook.pdf	HR Dept. Document	Company Handbook	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	05/25/2017 03:58 PM	2507	mblake@evolutionhcm.com
	MS Winery		MS Winery Holiday Schedule.docx	HR Dept. Document	Holiday Schedule	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	06/09/2017 09:22 AM	11	mblake@evolutionhcm.com
	MS Winery		wine logo 3.png	Company	Company Logo	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	05/25/2017 08:36 AM	9	Vlaren@sharklakers.com
	MS Winery		wine logo.png	Announcement	Best in Class Award	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	05/25/2017 09:01 AM	8	mblake@evolutionhcm.com

Page: 1 of 1 Go Page size: 5 Change Item 1 to 5 of 5

The Company Documents dashboard will show all the documents that have been uploaded to a company. If no company has been selected, ALL company documents will be displayed.

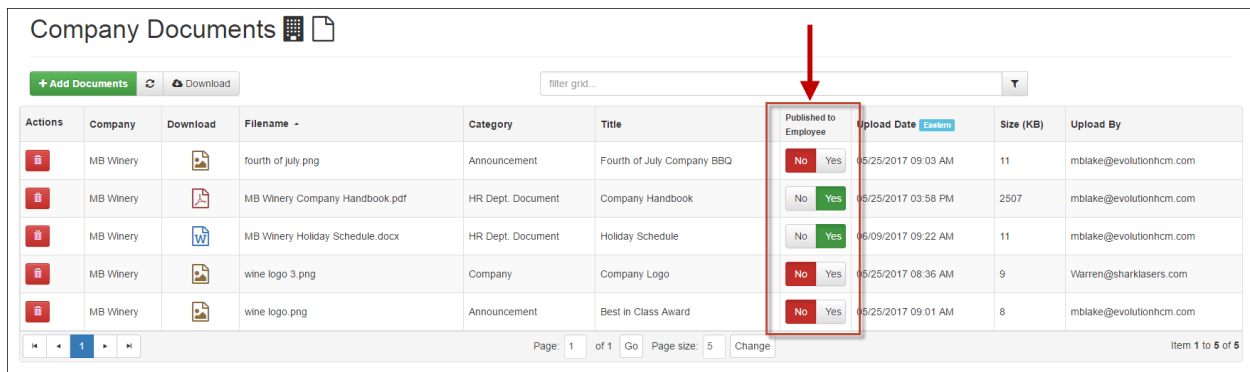
Click the green **Add Documents** button to upload documents.

The **Company Documents Dashboard** displays:

- 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.



Actions	Company	Download	Filename	Category	Title	Published to Employee	Upload Date	Size (KB)	Upload By
	MB Winery		fourth of july.png	Announcement	Fourth of July Company BBQ	No Yes	6/25/2017 09:03 AM	11	mblake@evolutionhcm.com
	MB Winery		MB Winery Company Handbook.pdf	HR Dept. Document	Company Handbook	No Yes	6/25/2017 03:58 PM	2507	mblake@evolutionhcm.com
	MB Winery		MB Winery Holiday Schedule.docx	HR Dept. Document	Holiday Schedule	No Yes	6/09/2017 09:22 AM	11	mblake@evolutionhcm.com
	MB Winery		wine logo 3.png	Company	Company Logo	No Yes	6/25/2017 08:36 AM	9	Warren@sharkslasers.com
	MB Winery		wine logo.png	Announcement	Best in Class Award	No Yes	6/25/2017 09:01 AM	8	mblake@evolutionhcm.com

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

Field / Button	Description
Published to Employee	Click on the Yes/No toggle buttons to determine if this company document should be published to the Employee Documents (company) – the employee documents folder (for ALL employees).
Download	Click on a document icon – to the left of the Filename – to download the document to your computer.

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)

Document: Benefit packages.pdf

Company
Shelburne Farms 03 (do not touch) (SF03)

Category
Benefits

Title
Benefit Packages Summary

Description
You have the right to an easy-to-understand summary about a health plan's benefits and coverage. Insurance companies and job-based health plans must provide you with: A short, plain-language Summary of Benefits and Coverage (SBC) A Uniform Glossary of terms used in health coverage and medical care.

Info
Filename: Benefit packages.pdf
Size (KB): 90
Upload Date: 10/03/2017 10:26 AM
Uploaded By: Will.Roberts@Asuresoftware.Com

Attributes
Published To Employee: No Yes
Published To Manager: No Yes

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**.

Documents

Browse or Drag/Drop documents

Drag & drop files here ...

Browse ...

Adding documents is easy. Make sure you have selected a company and simply drag and drop your file from your computer. You can also browse files and add them that way.

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.

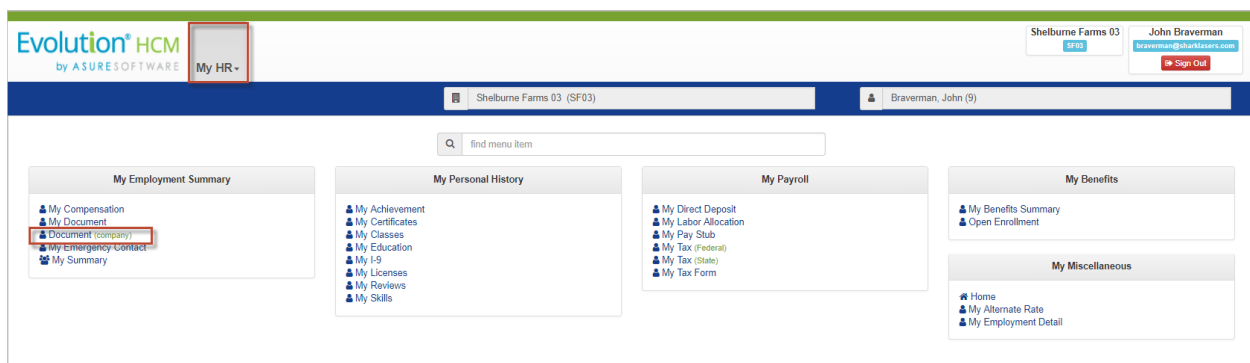
After uploading multiple documents, sort the summary list chronologically by clicking on the **Upload Date** column and click on the first document summary line to open the dialog box. Then use the **Save &**

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

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



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

Documents (company)

Download filter grid...

Download	Filename	Category	Title	Upload Date	Size (KB)	Upload By	Published To Manager
	Benefit packages.pdf	Benefits	Benefit Packages Summary	10/03/2017 10:26 AM	90		No Yes
	Employee Handbook.pdf			09/11/2017 12:43 PM	1		No Yes
	Letter from the CEO.pdf			08/24/2017 02:22 PM	1		No Yes

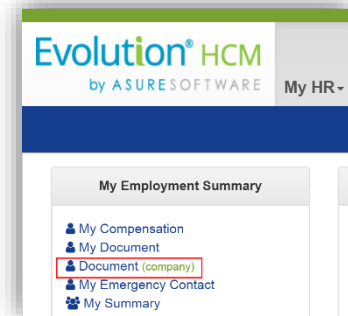
Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

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 run into 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.

The screenshot shows a configuration window for onboarding tasks. At the top, there are two toggle buttons: 'No' and 'Yes' (which is selected and highlighted in green). To the right of the 'Yes' button is a link that says 'Include Company Documents'. Below the toggles is a section titled 'Select/Change Company Documents' with a dropdown menu showing '3D printer.jpg, basic_dekuyper_banana_mai_tai.jpg, Letter from the CEO.pdf'. Underneath this is a table titled 'Saved Company Document Selection'.

Filename	Size (KB)
Letter from the CEO.pdf	1
basic_dekuyper_banana_mai_tai.jpg	65
3D printer.jpg	265

At the bottom of the window, there are again two toggle buttons: 'No' and 'Yes' (selected and highlighted in green). To the right of the 'Yes' button is a link that says 'Include Custom Document Upload'.

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 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.

Company List

<div> + New Download </div> <div>filter grid...</div> <div>Advanced Filter</div>						
Actions	Account	Company Name	Code	Create Date	Active	PR Integrated
	iSystems	Seuss Corporation	SEU	05/01/2017 10:52 AM	No Yes	No Yes
	iSystems	Seuss II Corporation	SEUII	05/09/2017 12:57 PM	No Yes	No Yes
	iSystems	Shelburne Farms 01	SF01	07/25/2017 02:29 PM	No Yes	No Yes
	iSystems	Shelburne Farms 02	SF02	07/26/2017 10:14 AM	No Yes	No Yes
	iSystems	Shelburne Farms 03	SF03	07/26/2017 10:30 AM	No Yes	No Yes
	iSystems	Shelburne Farms 04	SF04	07/26/2017 10:45 AM	No Yes	No Yes
	iSystems	Shelburne Farms 05	SF05	07/26/2017 10:51 AM	No Yes	No Yes
	iSystems	Shelburne Farms 06	SF06	07/26/2017 11:04 AM	No Yes	No Yes

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:

Number of companies you can view:

- 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

This dashboard also shows at a glance whether the company is **Active** and **Payroll Integrated**.


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.


<div> + New Download </div> <div>filter grid...</div> <div>Advanced Filter</div>						
Actions	Account	Company Name	Code	Create Date	Active	PR Integrated
	iSystems	Shelburne Farms 03	SF03	07/26/2017 10:30 AM	No Yes	No Yes











[1](#)

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

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

Company List 

[+ New](#)  [Download](#) [Advanced Filter](#)

Actions	Account	Company Name	Code	Create Date <small>Eastern</small>	Active	PR Integrated
	iSystems	A Small Production - DO NOT TOUCH	009	10/03/2017 10:46 AM	No Yes	No Yes
	iSystems	Amazing Sample Client - Ido	Alpha	09/25/2017 01:00 AM	No Yes	No Yes
	iSystems	Basic Payroll Plus	CO7	06/12/2017 02:27 PM	No Yes	No Yes
	iSystems	Benefits Test (No Payroll Connection)		09/20/2017 08:11 AM	No Yes	No Yes
	iSystems	BetteanneUSA PAYROLLS, INC-EngCpy	9999-EngCpy	08/29/2017 02:11 PM	No Yes	No Yes
	iSystems	Capin Crouse 2.0	CO892	08/09/2017 02:32 PM	No Yes	No Yes
	iSystems	Company 5 - Change Name	CO5	05/03/2017 07:00 PM	No Yes	No Yes
	iSystems	CPP	CO3	05/03/2017 06:58 PM	No Yes	No Yes
	iSystems	CPP-CC3	0CPP-CC3 Lucy	09/25/2017 04:13 PM	No Yes	No Yes
	iSystems	Furn Co - DO NOT TOUCH	011	10/06/2017 03:52 PM	No Yes	No Yes

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

Company: Shelburne Farms 03

<p>Company Info</p> <p>Account iSystems</p> <p>Company Name Shelburne Farms 03 ✓</p> <p>Active No Yes</p> <p>Timezone Eastern (US and Canada) (UTC-05:00)</p> <p>Create Date <small>Eastern</small> 07/26/2017 10:30 AM</p> <p>Service Start Date 07/26/2017</p>	<p>Physical Name/Address</p> <p>Doing Business As Shelburne</p> <p>Address Line 1 15 Sample</p> <p>Address Line 2 Address Line 2</p> <p>City Burlington</p> <p>State VT - VERMONT, US</p> <p>Zip Code 05620</p>	<p>Legal Name/Address</p> <p>Legal Name Shelburne Farms</p> <p>Address Line 1 58 Rathe Rd</p> <p>Address Line 2 Address Line 2</p> <p>City Colchester</p> <p>State VT - VERMONT, US</p> <p>Zip Code 05402</p>
---	--	--

When a company is opened, you can view:

- Address and contact info
- 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**.

Contact

First Name
First Name

Last Name
Last Name

Email
your.email@domain.com

Bus Phone
123.456.7890 x123

Cell Phone
123.456.7890 x123

Other Info

Worker Comp Policy ID
Policy ID

Organization Level for Employee Assignment
Division

Enabled SwipeClock Sync for 1099 Employees
No Yes

Contact info and Organizational Structure (DBDT) should be entered here

Other Info

Worker Comp Policy ID
516814684651

Organization Level for Employee Assignment
Department

Enabled SwipeClock Sync for 1099 Employees
No Yes

Integration

Timeclock
Sync Employee To Timeclock

Excluded From Updates
No

Export Block
No Yes

Web Clock Enabled

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.

Previously, the **Sync** button only appeared for regular (W-2) employees.

Integration

General Settings

Payroll Integration
No Yes

Client ID
Client ID

Company ID
SF03

Payroll Service Location
Evolution V3 - https://apistaging.evolution-software.com/v3/api/bureaus/hri...

Payroll Options

Enable Employee Portal (Time Off)

☐ No ☒ Yes

For the Company Logo upload, the **Allow Private Label** toggle should be set to **Yes**.

Private Label

Allow Private Label ☐ No ☒ Yes

Private Label Key [Create / Change Key](#) [Clear Key](#)

Key

Private label Link

Benefits

Show Future-Dated Benefit Plans For Enrollment

☐ No ☒ Yes

Termination

Status

Termination Reason

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**.

Benefits

Show Future-Dated Benefit Plans For Enrollment

☐ No ☒ Yes

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

Default Settings

Default Applicant Security 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 be selected manually. Applicant Tracking is covered in the *Advanced HR 2.0 Applicant Tracking Guide*.

Company Logo Upload

Private Label

Allow Private Label

No

Yes

Private Label Key [% Create / Change Key](#) [% Clear Key](#)

cc6ba7ab-f3df-4f58-93e6-bed1977922f0

Private label Link

<https://isystems.evolutionadvancedhr.com/Login.aspx?companykey=cc6ba7ab-f3df-4f58-93e6-bed1977922f0>

Company Logo Upload:

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

Drag and drop files, or browse your computer.

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

Company Logo (only JPG, PNG, and GIF extension files allowed here)

Already Attached

These documents are already attached to this record.

Download	Filename	Size (KB)	Upload Date
	camera.jpg	7	10/10/2017

Browse or Drag/Drop documents

Drag & drop files here ...

Browse

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.

Preferences/Defaults

New Hire/Onboarding

Tax Form (Type of Hire)

W2 - Employee

Pay Frequency

Bi-Weekly - Bi-Weekly

Employment Type

Full Time - Full Time

Display Emergency Contact

No

Yes

Pay Type

Hourly - Hourly

Status

Active - Active

Emergency Contact Required

No

Yes

Compensation Change Reason

Please Choose (represents BLANK)

Position/Org Change Reason

Please Choose (represents BLANK)

E-Verify Participant

No

Yes

Onboarding - Notification Links

Onboarding Notifications are now setup and handled from the **NOTIFICATIONS** page.

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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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.
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 .

Field / Button	Description
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.

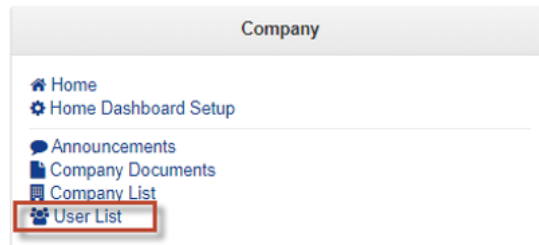
User List Screen and Adding a New User

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 screens in the system, or just the ones 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 what security roles and access users have.



Note: It's important to remember that 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 login, 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 

Actions	Username	Active	Create Date	First Name	Last Name
  	BD@sharklasers.com	No Yes	08/02/2017 12:48 PM	Boris	Dyer
  	bfleck@sharklasers.com	No Yes	08/09/2017 10:17 AM	Bill	Fleck
  	brave@sharklasers.com	No Yes	08/14/2017 03:47 PM	John	Braverman
  	chickw@sharklasers.com	No Yes	08/09/2017 09:26 AM	Chick	Webb
  	dshming@sharklasers.com	No Yes	09/01/2017 03:21 PM	Dorothy	Shming
  	Jamison@sharklasers.com	No Yes	09/11/2017 02:36 PM	Jamison	Alfonse
  	johnson@sharklasers.com	No Yes	08/25/2017 03:52 PM	John	Samson
  	Jsmith@sharklasers.com	No Yes	08/21/2017 10:55 AM	Johnathan	Smith
  	MF@sharklasers.com	No Yes	08/02/2017 10:24 AM	Megan	Forsyth
  	mpupick@sharklasers.com	No Yes	08/09/2017 10:12 AM	Mervin	Pupik

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 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)

User: NEW RECORD


User Info

Username  mayal@pokemail.net


Password  Very Strong


Create Date  10/10/2017 01:35 PM


Active ☒ Yes

Locked Out Until Date  Locked Out Until Date

Contact

First Name  Mayal

Last Name  Marvel

Timezone  Eastern (US and Canada) (UTC-05:00)

Administration

Is Super Admin ☒ Yes

Is Service Bureau Admin ☒ Yes

Evolution Administration

Payroll Rights Granted ☒ Yes

Company Rights Granted ☒ Yes

Employee Rights Granted ☒ Yes

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.

Clicking on the **Username** will open up 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 & 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 are:

- **Base user** for employee self service only access
- **Manager** for manager access
- **HR 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 security role.

You can also create custom Roles with specific security settings.






Important Note: 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 logging into Advanced HR 2.0.

To Add a New User in the System

Click on the green “+ New” icon  to open the **New User Record** screen.

User: **NEW RECORD**

User Info Username  <input type="text" value="Username (email)"/> * Password  <input type="password" value="password"/>  Create Date  <input type="text" value="10/04/2017 02:37 PM"/> Active <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Locked Out Until Date  <input type="text" value="Locked Out Until Date"/>	Contact First Name <input type="text" value="First Name"/> * Last Name <input type="text" value="Last Name"/> * Timezone <input type="text" value="Please Choose (represents BLANK)"/> *	Administration Is Super Admin <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Is Service Bureau Admin <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Evolution Administration Payroll Rights Granted <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Company Rights Granted <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Employee Rights Granted <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
--	--	--	--

Enter the following information:

1. **Username** (email address required).
2. **Password** (optional, the user can change the password when logging 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.

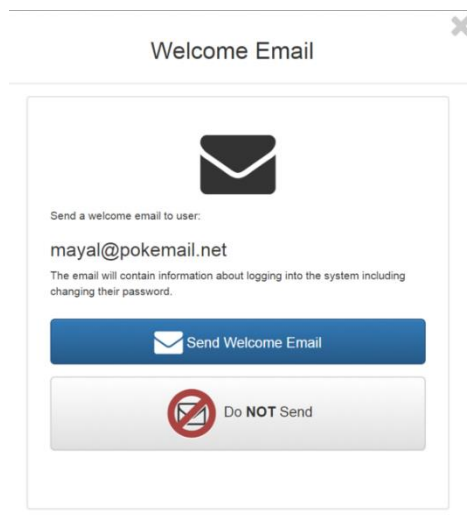
As you can see from the screens below there are significantly more settings options compared to the **Quick Add** screen. A good best practice is to always set up new Users in this area of Advanced HR 2.0.

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 logging 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 login 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).

Note: 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 security role.

Creating Service Bureau Admins and Assigning them Clients

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

- Go to **HR Admin - Company - User List**.
- Click the green **New** button.
- Enter a **Username** (needs to be an email address).
- Contact info and Time Zone.
- Use the **No/Yes** toggle to designate them as a **Service Bureau Admin**.

User: NEW RECORD

<p>User Info</p> <p>Username <input type="checkbox"/> <input type="text" value="Username (email)"/></p> <p>Password <input type="password" value=""/></p> <p>Create Date Eastern 09/20/2017 11:20 AM</p> <p>Active <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes</p> <p>Locked Out Until Date Eastern Locked Out Until Date</p>	<p>Contact</p> <p>First Name <input type="text" value=""/></p> <p>Last Name <input type="text" value=""/></p> <p>Timezone Please Choose (represents BLANK)</p>	<p>Administration</p> <p>Is Super Admin <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes</p> <p>Is Service Bureau Admin <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes</p>	<p>Evolution Administration</p> <p>Payroll Rights Granted <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes</p> <p>Company Rights Granted <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes</p> <p>Employee Rights Granted <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes</p>
--	---	---	---

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:

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

Assign users to companies

STEP 1 - Choose a User

To begin process, choose a user you'd like to assign to a company or multiple companies.

7p26va+3v2fcjpxigmgu7te88s@sharklasers.com - Test Employee ▼

STEP 2 - Select Companies

Select the companies that the above user should have access to.

Download

Company Assigned	Company Name	Code
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Shelburne Farms 01	SF01
<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Shelburne Farms 02	SF02
<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Shelburne Farms 03	SF03

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.

Division Types  

[+ New](#)  



Actions	Code	Description	Active	Priority	Parent Map
	01 - Corporate	Corporate Headquarters	No Yes		----
	02 - EAST	Eastern Division	No Yes		----
	03 - WEST	Western Division	No Yes		----
	04 - SOUTH	Southern Division	No Yes		----



Page: 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4




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

Branch

Displays the Branch Types set up for this company.

Branch Types  

[+ New](#)  



Actions	Code	Description	Active	Priority	Parent Map
	IT	Information Technology	No Yes		----
	MK	Marketing	No Yes		----
	OP	Operations	No Yes		----


Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3








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

Department

Displays the Department Types set up for this company.

Department Types  

[+ New](#)  [Download](#)



Actions	Code	Description	Active	Priority	Parent Map
	10-Sales	Sales	No Yes		----
	20-Accounting	Accounting Dept	No Yes		----
	30-Human Resources	Human Resources Dept	No Yes		----
	40-Warehouse	Warehouse Dept	No Yes		----
	50-Vineyard #1	Vineyard	No Yes		----
	60-Reds	Red Wines	No Yes		----
	70-Whites	White Wines	No Yes		----


Page: 1 of 1 Go Page size: 7 Change Item 1 to 7 of 7


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

Team

Displays the Team Types set up for this company.

Team Types  

[+ New](#)  [Download](#)

Actions	Code	Description	Active	Priority	Parent Map
	Alpha Team	Alpha Team	No Yes		Farm Stand Warehouse Customer Service--

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

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

Reporting Menu























There are two ways to run reports in Advanced HR 2.0. You can run **Standard Reports**, or create Custom Reports (using **Quick Report Writer**). The system comes with dozens of Standard Reports out of the box. These reports cover everything from Absentee Lists, New Hire Lists, to Workers Comp Types.

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.

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

  Download		filter grid...	 Advanced Filter 		
Actions	Name -	Description	Category	Active	Available To
 	Absence Types	Absence Types List Report	Company Setup	No Yes	SuperAdmin
 	Achievement Types	Achievement Types List Report	Company Setup	No Yes	ManagersAndAbove
 	Audit List	Full List of Audit records for the specified date range - including system and setup records.	Internal System	No Yes	AdminsAndAbove
 	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

Standard Reports screen

Notice that you see the **Name**, **Description**, **Category**, **Active Status**, and who the report is **Available To**.

In the **Standard Report List**, search for the term “User”. Click the green **Arrow** button to run the Report.

Standard Report List

Search: Advanced Filter

Actions	Name	Description	Category	Active	Available To
	Service Bureau Users	Even though this report prompts for a company it returns all the super and global admin user in the system. The columns include User Name, Users Last and First Names, Companies (if specified), User Status, TFA Status, TFA Setup Complete Indicator, Create Date, and Super and Global Admin.	Users	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	SuperAdmin
	User in Roles	Includes all user and role records for each user with the specified status. The columns include Username, Active Status, Two-Factor Active Indicator, Create Date, Employee Name(s), Employee ID, Company and Role Name	Users	No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	AdminsAndAbove
	User Integrations	All user in the specified status. The columns include User Name, HRAnswerLink User Name, NCS User Name, Payroll Multi-Company Indicator, ThinkHR User Name, and Clock Number			
	User Lock-outs	Returns a list of all locked-out users in the system. The columns include User Name, User Status, Locked-Out Until, Employee ID, Login Attempts, the TFA Active Flag, and the TFA Setup Status Indicator.			

Page: 1 of 1 Go Page size: 4

Set Report Properties

User in Roles

STEP 1 - Set Report Parameters

Assign your parameters that will be used in the report execution.

Company: Active: ☒ NO ☐ ALL ☐ YES

Effective Date:

FINALLY - Confirm and Click

Confirm your information and click below.

Execute Report

Set the **Report Properties** and click **Execute Report**.

User in Roles

Users In Roles
Shelburne Farms 03
Active Users As Of 8/31/2017
Sorted By User Name

User Name	Active	TFA	Create Date	Employee Name	Employee ID	EE Status	Role
SD@sharklax.com	True	False	8/2/2017	Dyer, Boris	486	Active	SF03 Base Admin
bfleck@sharklax.com	True	False	8/6/2017	Fleck, Bill	681	Active	SF03 Base User
bfleck@sharklax.com	True	False	8/6/2017	Fleck, Bill	681	Active	SF03 Base Manager
brave@sharklax.com	True	False	8/14/2017	Braveman, John	711	Active	SF03 Base User
chick@sharklax.com	True	False	8/6/2017	Webb, Chick	678	Active	SF03 Base User
johnson@sharklax.com	True	False	8/25/2017	Sanson, John	2016	Active	SF03 Base User
jumth@sharklax.com	True	False	8/21/2017				
mf@sharklax.com	True	False	8/2/2017	Forsyth, Megan	404	Active	SF03 Base User
mf@sharklax.com	True	False	8/3/2017	Forsyth, Megan	404	Active	SF03 Base Manager
mpupick@sharklax.com	True	False	8/6/2017				
public@sharklax.com	True	False	8/3/2017				SF03 Base User
robert@sharklax.com	True	False	8/3/2017	McIntosh, Rockford	675	Active	SF03 Base User
sd@sharklax.com	True	False	8/2/2017				SF03 Base User

Page 1 of 1

Employee Status

Active ☒ In-Active ☐ Clear selection

Effective Date:

Sort Order

User Name ☒ User Last Name ☐ Create Date ☐ Active ☐ Employee Last Name ☐ Role ☐ Employee Status Code ☐

The **Users in Roles Report** will be generated.

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 custom reports on data within Advanced HR.

The QRW interface is divided into three main sections: Setup, Settings, and Save Report Configuration.

Setup: This section allows you to choose a report concept and select fields. It includes a "Choose Report (Existing OR New Concept)" section with "Existing Saved Report" and "Report Concept" dropdowns. Below this are "Unselected Fields" and "Selected Fields" lists. The "Unselected Fields" list has a search bar and a "Field Name" input. The "Selected Fields" list has a "Field Name" input.

Settings: This section includes "Company" (Shelburne Farms 03 (SF03)), "Include Active Employees" (NO, ALL, YES), "Order Report By" (Please Choose (represents BLANK)), and "Order Direction" (Ascending (low to high)). The "Filtering" section includes a "Simple Filter" (simple filter) and an "Advanced" section with four fields (Field 1, Field 2, Field 3, Field 4) each with a dropdown, a comparison operator, and an input field. A button "Use only 1 of Simple OR Advanced" is present.

Save Report Configuration: This section includes a "Name" field (Name) and a "Description" field (Description). It has buttons for "Save/Update Report Configuration" and "Delete Report Configuration". Below these are buttons for "Output to SCREEN" and "Output to CSV". A "Generated Report" section is at the bottom.

Quick Report Writer (QRW) screen

The first step is to select the **Report Concept**. The concept you choose will dictate which fields are automatically selected for the report. For example, if you select **Benefits**, Advanced HR would select fields that relate to benefits as you can see in the screenshot below.

Report Concept	
Please Choose (represents BLANK)	
Please Choose (represents BLANK)	
Absences - CONCEPT	
Achievement - CONCEPT	
AlternateRate - CONCEPT	
Benefits - CONCEPT	
Certificates - CONCEPT	
Classes - CONCEPT	
Compensation - CONCEPT	
DirectDeposit - CONCEPT	
Education - CONCEPT	
Emergency Contacts - CONCEPT	

Selected Fields	
Field Name	
Company Name	
Company Code	
Display Name	
Employee ID	
Benefit Plan Description	
Plan Type Description	
Benefit Employee Premium	

Advanced HR will also display “**Unselected Fields**” that can be added to the selected fields list 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.

Unselected Fields	
find field	
Field Name	
First Name	
Last Name	

Selected Fields	
Field Name	
Company Name	
Company Code	
Display Name	

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

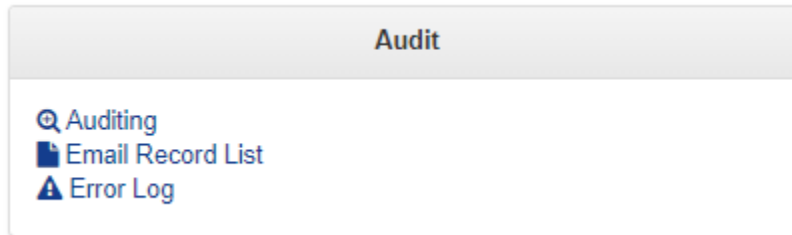
1. Selecting which companies you are reporting on if you have more than one
2. Reporting on only inactive employees (NO), all employees (ALL), or only active employees (YES)
3. Which field you want the report to sort on and in what direction (ascending or descending).

Tip:

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

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 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				
Audit Date	Area	Employee	Field	Old	New	User	Type	Transaction	
10/02/2017 03:38 PM	Employee	Braverman, John (9)	Address1	[Blank]	15 Enterprise Way	Will.Roberts@Asuresoftware.Com	Update	20171002193817679	
10/02/2017 03:38 PM	Employee	Braverman, John (9)	City	[Blank]	Thunderbolt	Will.Roberts@Asuresoftware.Com	Update	20171002193817679	
10/02/2017 03:38 PM	Employee	Braverman, John (9)	CountryStateType	[Blank]	VERMONT	Will.Roberts@Asuresoftware.Com	Update	20171002193817679	
10/02/2017 03:38 PM	Employee	Braverman, John (9)	FrequencyTypeID_EVO	[Blank]	206	Will.Roberts@Asuresoftware.Com	Update	20171002193817679	
10/02/2017 03:38 PM	Employee	Braverman, John (9)	UD_Memo1	[Blank]	Disability	Will.Roberts@Asuresoftware.Com	Update	20171002193817679	
10/02/2017 03:38 PM	Employee	Braverman, John (9)	Zip	[Blank]	05602	Will.Roberts@Asuresoftware.Com	Update	20171002193817679	
10/02/2017 03:27 PM	Announcement		IsHighPriority	True	False	Will.Roberts@Asuresoftware.Com	Update	20171002192720995	
10/02/2017 03:24 PM	Announcement		IsHighPriority	[Blank]	True	Will.Roberts@Asuresoftware.Com	Insert	20171002192447321	

Audit Details screen

The **Audit Details** grid also has an advanced filter that allows you to narrow down results by a date or range of dates.

Advanced Filter

Audit Date

Start

End

Start Date

End Date

Apply Filter

Clear Filter

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.

Sent Emails

Download

filter grid...

Advanced Filter

Actions	Company	OriginAddress	Sent Date	Address List	Subject
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/28/2017 07:13 PM	, Jack@sharklasers.com	Shelburne Farms 03 - Employee Onboarding Invitation
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/27/2017 12:06 PM	MF@sharklasers.com, BD@sharklasers.com, Jack@sharklasers.com	Shelburne Farms 03 - Employment Offer
	Shelburne Farms 03	MF@sharklasers.com	09/27/2017 11:13 AM	MF@sharklasers.com, BD@sharklasers.com, Jack@sharklasers.com	Shelburne Farms 03 - Interview Scheduled
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/27/2017 10:36 AM	MF@sharklasers.com, BD@sharklasers.com	Shelburne Farms 03 - Job Application Complete for: Jackson Smithers - Jack@sharklasers.com
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/27/2017 09:52 AM	, Jack@sharklasers.com	Shelburne Farms 03 - Job Application Notification
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/25/2017 12:05 PM	MF@sharklasers.com	Shelburne Farms 03 - Job Application Complete for: Digby Zellers - Digby@sharklasers.com
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/11/2017 03:23 PM	, Jamison@sharklasers.com	Welcome User/Password Notification
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/11/2017 02:42 PM	, Jamison@sharklasers.com	Shelburne Farms 03 - Employee Onboarding Invitation
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/11/2017 02:40 PM	, Jamison@sharklasers.com	Shelburne Farms 03 - Employee Onboarding Invitation
	Shelburne Farms 03	wroberts@evolutionhcm.com	08/25/2017 03:52 PM	, johnson@sharklasers.com	Welcome User/Password Notification

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

Prev Record

Next Record

Close

View Email Record

Email Record

Company

Shelburne Farms 03

Origin Address

wroberts@evolutionhcm.com

Subject

Shelburne Farms 03 - Employee Onboarding Invitation

Address List

, johnson@sharklasers.com

Sent

08/25/2017 03:45 PM

Email Contents

Shelburne Farms 03

Thank you for your interest in our company.

We welcome you to our Employee Onboarding process. Please click the link below to get started.

<https://systems.evolutionadvancedhr.com/Onboarding.aspx?onboardingkey=09f3426c-c78c-418b-90ab-f43b4a842e4f>

Prev Record

Next Record

Close

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.

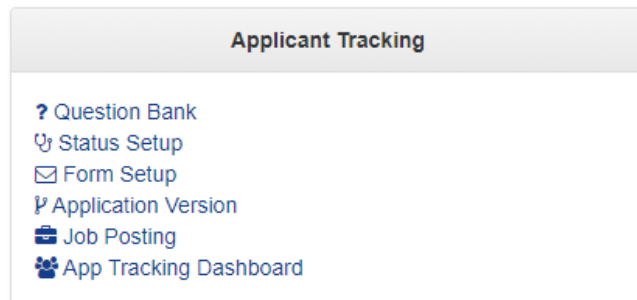
Error Log ⚠					
<div> Download </div>		<input type="text" value="filter grid..."/>			
Actions	Error Date Eastern	Exception	Log Type	Page	Username
	04/03/2018 08:56 AM	Evolution Payroll Integration Error From API. Code: 10, Message: Evolution API Gateway: Problem wit ...	Application	BenefitPlanList	Asuresoftware.Com
	04/03/2018 08:56 AM	Evolution Payroll Integration Error From API. Code: 10, Message: Evolution API Gateway: Problem wit ...	Application	BenefitPlanList	Asuresoftware.Com
	03/29/2018 02:41 PM	Evolution Payroll Integration Error From API. Code: 10, Message: Evolution API Gateway: Problem wit ...	Application	BenefitPlanList	Asuresoftware.Com
	03/29/2018 02:41 PM	Evolution Payroll Integration Error From API. Code: 10, Message: Evolution API Gateway: Problem wit ...	Application	BenefitPlanList	Asuresoftware.Com
	03/29/2018 02:40 PM	Evolution Payroll Integration Error From API. Code: 10, Message: Evolution API Gateway: Problem wit ...	Application	BenefitPlanList	Asuresoftware.Com

The **Download this Record** button has been added to the Error Log Dashboard for each error log (row) on the screen so that the user can easily download it as a text file instead of copying and pasting from the Error Log details screen.

Error Log ⚠		
<div> Download </div>		<input type="text" value="filter grid..."/>
Actions	Error Date Eastern	Exception
	03/28/2018 09:26 AM	Evolution Payroll Integration Error From API. Code: 10, Message: Evolution API Gateway: Problem wit ...

Applicant Tracking Menu

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



This section presents a brief overview of the Applicant Tracking 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*.

- **Question Bank**

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

- **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 new Notifications functionality, three Forms previously set up on the Form Setup screen can now be done with Notifications.

- **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.

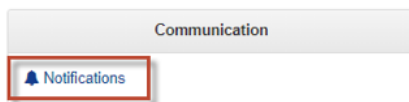
Communications Menu

The **Communications** menu 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.

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.



Notifications can deliver default template messages:

- During applicant tracking
- For interview workflows
- Offer letters when submitted / rejected
- When employees enroll in training classes
- Welcome emails to employees
- Password reset emails for users

Notifications

Notification System is ON and ready for use

Download

Employee Onboarding - Employee Onboarding -

Category -	Name	Active	Recipients	Delivery	Description
Employee Onboarding	Employee Onboarding Invitation	No Yes	Target Employee	Delivery when event occurs	Invitation to new Employee to begin Onboarding process
Employee Onboarding	Employee Onboarding Complete Notification	No Yes	Reports To 1	Delivery when event occurs	Employee Onboarding process has been completed by Employee

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

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

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

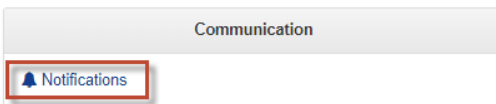
All notifications come with templates that include generic wording with some logic built in. However, you can edit them with company-specific wording and logic. Depending on the Notification, you can choose the recipients to be included:

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

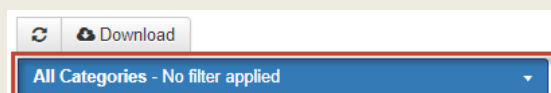
You can set any Notification to be **Active** or **Inactive**. To access and or edit Notifications, the user must have the role of **Base Admin** or higher.

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 that you'd like 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.

Notifications

Notification System is ON and ready for use

Download

Applicant Tracking - Applicant Tracking

Standard - Standard Events

Actions	Category	Name	Active	Recipients	Delivery	Description
	Applicant Tracking	Application Started	No Yes	Target Applicant	Delivery when event occurs	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.
	Applicant Tracking	Application Submitted	No Yes	Target Applicant	Delivery when event occurs	Sent to an Applicant when they have Submitted a job application.
	Applicant Tracking	Application Completed	No Yes	Recruiters	Delivery when event occurs	Sent to Recruiters to notify them when an Applicant has completed a job application.
	Applicant Tracking	Interview Scheduled	No Yes	Target Applicant - Recruiters	Delivery when event occurs	Sent to an Applicant and Recruiters when a job interview is scheduled.
	Applicant Tracking	Employment Offer	No Yes	Target Applicant - Recruiters	Delivery when event occurs	Sent to Applicant and Recruiters to let them know an offer has been sent to the Applicant.
	Applicant Tracking	Application Rejected	No Yes	Target Applicant - Recruiters	Delivery when event occurs	Sent to Applicant and Recruiters to let them know an application has been rejected.
	Applicant Tracking	Employment Offer Accepted	No Yes	Recruiters	Delivery when event occurs	Sent to a Recruiter when an applicant has accepted a job offer.
	Applicant Tracking	Employment Offer Rejected	No Yes	Recruiters	Delivery when event occurs	Sent to a Recruiter when an applicant has rejected a job offer.

Page: 1 of 1 Go Page size: 8 Change Item 1 to 8 of 8

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 particular categories of Notifications that you'd like to display. Of course, the user can 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.

Notification: Employment Offer

Company

Company

Shelburne Farms 03 (SF03)

Status

Active

No Yes

Notification Info

Category

Applicant Tracking

Trigger Type

Event

Name

Employment Offer

Description

Sent to Applicant and Recruiters to let them know an offer has been sent to the Applicant.

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

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

Recipients

Include Target

Applicant

No Yes

Delivery

Delivery happens when event occurs.

Include Other Groups

Recruiters

No Yes

Employees (check all that apply)

Please Choose

Users (check all that apply)

Please Choose

The **Recipients** section's delivery options will vary depending on the category of Notification:

Including Other Groups allows the user to select others 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**:

Form Template

[Reset Template back to default](#)

Subject
[COMPANYNAME] - Employment Offer

Body

[COMPANYNAME]

Status - [JOBAPPLICATIONSTATUSTITLE]

Offer being made for:

[DISPLAYNAME]

Thank you [FIRSTNAME] [LASTNAME] for your interest in our company. We are prepared to offer you the following package:

[DYNAMICEMAILBODY]

Please follow the below link to review and confirm your response to this offer.

The **Form Template** is what the recipient(s) will receive. Users can make edits.

With **email replacement keyword** functionality built into the template, when the notification is triggered, those keywords will be replaced with logically corresponding data.

[COMPANYNAME], will display the company's name at the top of the Notification. Users have the ability to add any keywords. Simply click the blue information icon to access the list of keywords.

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.

Replacement Field Keys

Users (check all to apply)
Please Choose

Form Template ⓘ

[Reset Template back to default](#)

Subject
[COMPANYNAME]

Body

[COMPANYNAME]

User

- [FIRSTNAME]
- [LASTNAME]
- [USERNAME]
- [PAGELINK]
- [URLLINK]

App Tracking

- [FIRSTNAME]
- [LASTNAME]
- [ADDRESS1]
- [CITY]
- [STATE]
- [ZIP]
- [EMAIL]
- [PHONEHOME]
- [PHONECELL]
- [JOBAPPLICATIONSTATUSTITLE]
- [JOBPOSTINGTITLE]
- [JOBPOSTINGDESCRIPTION]
- [COMPANYNAME]
- [DISPLAYNAME]
- [PAGELINK]
- [RHTML]
- [DYNAMICEMAILBODY]

Employee Onboarding

- [FIRSTNAME]
- [LASTNAME]
- [ADDRESS1]
- [CITY]
- [STATE]
- [ZIP]
- [EMAIL]
- [PHONEHOME]
- [PHONECELL]
- [COMPANYNAME]
- [DISPLAYNAME]
- [POSITIONTITLE]
- [POSITIONDESCRIPTION]
- [PAGELINK]
- [ERRORHTML]

Classes

- [FIRSTNAME]
- [LASTNAME]
- [ADDRESS1]
- [CITY]
- [STATE]
- [ZIP]
- [EMAIL]
- [PHONEHOME]
- [PHONECELL]
- [COMPANYNAME]
- [DISPLAYNAME]
- [POSITIONTITLE]
- [POSITIONDESCRIPTION]
- [CLASSTITLE]
- [CLASSEDDESCRIPTION]
- [CLASSINSTRUCTOR]
- [CLASSLOCATION]
- [CLASSDATETIME]

Time Off

- [FIRSTNAME]
- [LASTNAME]
- [ADDRESS1]
- [CITY]
- [STATE]
- [ZIP]
- [EMAIL]
- [PHONEHOME]
- [PHONECELL]
- [COMPANYNAME]
- [DISPLAYNAME]
- [POSITIONTITLE]
- [POSITIONDESCRIPTION]
- [TIMEOFFTYPE]
- [HOURSSTART]
- [TIMEOFFSTART]
- [TIMEOFFRETURN]
- [PUBLICNOTES]
- [TIMEOFFSTATUS]
- [APPROVEDBY]
- [PAGELINK]

Compliance / Employee

- [FIRSTNAME]
- [LASTNAME]
- [ADDRESS1]
- [CITY]
- [STATE]
- [ZIP]
- [EMAIL]
- [PHONEHOME]
- [PHONECELL]
- [COMPANYNAME]
- [DISPLAYNAME]
- [POSITIONTITLE]
- [POSITIONDESCRIPTION]
- [PAGELINK]

Direct Deposits

- [FIRSTNAME]
- [LASTNAME]
- [ADDRESS1]
- [CITY]
- [STATE]
- [ZIP]
- [EMAIL]
- [PHONEHOME]
- [PHONECELL]
- [COMPANYNAME]
- [DISPLAYNAME]
- [POSITIONTITLE]
- [POSITIONDESCRIPTION]
- [DIRECTDEPOSITSTARTDATE]
- [DIRECTDEPOSITENDDATE]
- [DIRECTDEPOSITACCOUNT]
- [DIRECTDEPOSITROUTING]
- [PUBLICNOTES]
- [DIRECTDEPOSITSPRENOTE]
- [DIRECTDEPOSITAMOUNTCODE]
- [DIRECTDEPOSITAMOUNT]

Copy the **Replacement Field Keys** as you see them here. Paste them into the body of the Template.

When the correct Replacement Field Keys are inserted, and the notification is triggered, those keywords will be replaced with logically corresponding data.

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**.

Category	Name	Active	Recipients	Delivery	Description
License & Certification	Achievement Expiration Date	No Yes			Notifies recipients of an Employee's upcoming Achievement expiration date
License & Certification	Certificate Expiration Date	No Yes			Notifies recipients of an Employee's upcoming Certificate expiration date
License & Certification	License Expiration Date	No Yes			Notifies recipients of an Employee's upcoming License expiration date

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:

Notification: License Expiration Date Reminder

Company

Company

1701 Club (W83)

Status

Active

No Yes

Notification Info

Category

License & Certification

Trigger Type

Date

Name

License Expiration Date Reminder

Description

Reminder for License Date Expirations

Recipients

Include Target

Employee

No Yes

Reports To 1

No Yes

Reports To 2

No Yes

Reports To 3

No Yes

Include Other Groups

Employees (check all that apply)

Mandrake, Lionel (13)

Users (check all that apply)

Please Choose

Delivery

Days

10

Timing

Before Target Date

Notification Info is read only by default.

Set the **Status** to **Active**.

Recipients allows you to set who will receive the Notification. Options include the **Employee** and up to three **Supervisors**.

The user can set the **Delivery** date to be any number of days **Before the Target Date** or **On the Target Date**.

You can also **Include Other Groups**, such as other **Employees** or other **Users**. Remember, since you are locked into a company, the dropdowns will only display Employees or Users from that company.

Form Template

Reset Template back to default

Subject

[COMPANYNAME] - License Expiration Date Reminder for: [DISPLAYNAME]

Body

[COMPANYNAME]

Reminder for: [DISPLAYNAME]

License Expiration Date: [TARGETDATE]

License Info: [TYPECODE] - [TYPEDESCRIPTION]

Please take the appropriate steps to renew the above license in a timely manner.

Thank you,

The Management

Notification: License Expiration Date Reminder

Save Changes Save & Next Record Prev Record Next Record Close

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 verbiage 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.

Column Field	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 display:
Days	Enter a number of days, then select the Timing value below.
Timing	Choose either: <ul style="list-style-type: none"> • Before Target Date • On Target Date

For a Date-Based Notification – for example – Birthdate Reminder – here is an example of setting the **Delivery Days** and the **Timing** fields to create a notification for the employee’s **Reports To 1** supervisor that will appear 5 days Before the Target Date, the employee’s birthday.

Delivery

Days ⓘ ✓

Timing ✓ ▼

The full **Recipients** section of the screen is shown below.

Notification: Birthday Reminder

Company

Company
Shelburne Farms 03 (SF03) ▼

Status

Active
☐ No ☒ Yes

Notification Info

Category
Employee Dates

Trigger Type
Date

Name
Birthday Reminder

Description
Reminder for Birthday

Recipients

Include Target

Employee	No	Yes
Reports To 1	<input type="radio"/> No	<input checked="" type="radio"/> Yes
Reports To 2	<input type="radio"/> No	<input type="radio"/> Yes
Reports To 3	<input type="radio"/> No	<input type="radio"/> Yes

Delivery

Days ⓘ ✓

Timing ✓ ▼

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

Notifications 🔔

Notification System is ON and ready for use

Download filter grid... ▼

License & Certification - License & Certification ▼

Category	Name	Active	Recipients	Delivery	Description
License & Certification	Achievement Expiration Date Reminder	No Yes			Reminder for Achievement Date Expirations
License & Certification	Certificate Expiration Date Reminder	No Yes			Reminder for Certificate Date Expirations
License & Certification	License Expiration Date Reminder	No Yes	Target Employee - Reports To 1 - Employees: Mandrake, Lionel (13)	Delivery occurs 10 days BEFORE the Target Date	Reminder for License Date Expirations

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

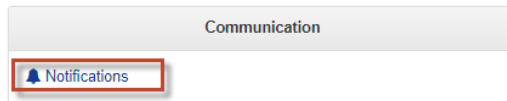
The Notification has now been setup; note the values in the **Recipients** and **Delivery** fields.

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

A screenshot of the 'Notifications' dashboard. At the top, it says 'Notification System is ON and ready for use'. Below this, there are two dropdown menus: 'Employee Dates - Important Employee Dates' (highlighted with a red box) and 'Standard - Standard Events'. A table lists several notifications. The first row, 'Employee Dates - Hire Date', has a green 'Copy' button in the 'Actions' column, which is highlighted with a red box. A tooltip above it says 'Clone this notification to a new custom notification'.

Actions	Category	Name	Active	Recipients	Delivery	Description
	Employee Dates	Hire Date	No Yes	Target Employee	Delivery occurs 2 days BEFORE the Target Date	Notifies recipients of an upcoming New Hire's start date
	Employee Dates	Termination Date	No Yes	Target Employee ~ Reports To 1 ~ Reports To 2 ~ Reports To 3	Delivery occurs ON the Target Date	Notifies recipients of an upcoming termination date for a specific Employee
	Employee Dates	Birthday	No Yes	Target Employee ~ Reports To 1 ~ Reports To 2 ~ Reports To 3	Delivery occurs ON the Target Date	Notifies recipients of an Employee's birthday
	Employee Dates	Employment Anniversary	No Yes	Target Employee ~ Reports To 1 ~ Reports To 2 ~ Reports To 3	Delivery occurs ON the Target Date	Notifies recipients of an Employee's employment anniversary

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.

Notification: CLONED - Hire Date

Company

Company
Shelburne Inn & Shoppes - Will (Will)

Status

Active
No Yes

Notification Info

Category
Employee Dates

Trigger Type
Date

Name
CLONED - Hire Date for Direct Supervisor

Description
CLONED - Notifies supervisor of an upcoming New Hire's start date

Recipients

Include Target

Employee	No	Yes
Reports To 1	No	Yes
Reports To 2	No	Yes
Reports To 3	No	Yes

Delivery

Days 5

Timing
Before Target Date

Note the changes we've made:

- Specific **Name**
- **Recipients**
- **Delivery** timeframe

Form Template

Subject
[COMPANYNAME] - Hire Date Reminder for: [DISPLAYNAME]

Body

[COMPANYNAME]

Reminder for: [DISPLAYNAME]

Hire Date: [TARGETDATE]

Please finalize and submit all onboarding paperwork for [FIRSTNAME] [LASTNAME]. They will be starting on your team as a [JOBPOSTINGTITLE].

Thank you

Notification: CLONED - Hire Date

Save Cloned Notification

Close

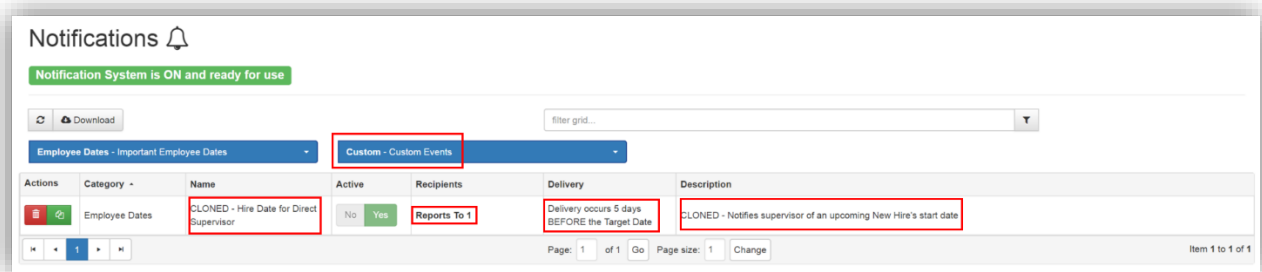
The above example shows the edited notification that will be received by the new hire's direct supervisor. Note the specific instructions with corresponding keyword logic.

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 sent to the **Direct Supervisor, 5 days before the Target Date** automatically.

Note that the Standard notifications events can be made Inactive, they cannot be deleted. Custom notification events, however, can be deleted.

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 where 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 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 rejected.
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

Category	Name	Description
	Employee Anniversary Reminder	Notifies recipients of an Employee's employment anniversary.
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
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
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 and we have recently completed phase two. 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.



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 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 SwipeClock Time & Attendance Management application and Advanced HR 2.0. This is a two-step process; you need to first set up the SwipeClock configuration and then set up the user credentials.

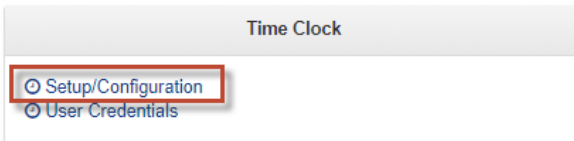
Time Clock Integration

- Set up the SwipeClock configuration
- Set up the user credentials

Setting Up the SwipeClock Configuration

To set up the SwipeClock 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.

A screenshot of the 'Time Clock Settings' screen. The screen has a green header bar with the title 'Time Clock Settings'. Below the header, there is a 'Settings' section with a dropdown menu for 'Company' set to 'Shelburne Farms 03 (SF03)'. The main content area is divided into three columns: 'Company Credentials', 'Optionally Passed', and 'Location/Department Assignment'. The 'Company Credentials' section has fields for 'Swipe Clock Username' (filled with 'evolutionhcm.com') and 'Swipe Clock Password' (filled with a masked password). The 'Optionally Passed' section has a 'Choose only 1' dropdown and several 'No/Yes' toggle buttons for 'Reports To 1', 'Supervisor (SC)', 'Rates', 'SSN', 'Title', 'Blank Fields', and 'Credentials (user/cards)'. The 'Location/Department Assignment' section has dropdowns for 'Map SC Location To:', 'Map SC Department To:', and 'Home 1,2,3 Assignment' with sub-sections for 'Map SC Home 1 To:', 'Map SC Home 2 To:', and 'Map SC Home 3 To:'.

3. Select the **Company**, if not already selected.
4. In the **Company Credentials** section, enter the **Admin** level Username and Password in the **Swipe Clock Username** and **Swipe Clock Password** fields. The User should be an **Account Type** of **Client** in SwipeClock.
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 SwipeClock. The options are:
 - **Reports to 1** option (the regular ‘reports to’ supervisor), or the
 - **Supervisor (SC)** (SwipeClock 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 SwipeClock:
 - **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 SwipeClock, complete the DBDT information in the **Location/Department Assignment** and the **Home 1, 2, 3 Assignment** sections of the screen.

Home 1,2,3 Assignment

Map SC Home 1 To:
Department - (Org Level 3)

Map SC Home 2 To:
Please Choose (represents BLANK)

Map SC Home 3 To:
Please Choose (represents BLANK)

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

Note: The **Credentials** (user/punch cards) toggle will allow the users SwipeClock SSO user to be created in AHR and then synced to SwipeClock. This removes the need to create user logins in SwipeClock.

Setting Up the SwipeClock User Credentials

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

SwipeClock 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 **Swipe Clock** section, enter the user's SwipeClock **SSO Username** and optionally, enter any additional user punch cards (**Card Numbers**).

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

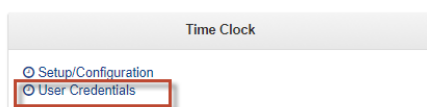
If the Employee user is also a SwipeClock Admin, please see the section on SwipeClock Admin setup .

Creating SwipeClock User after Advanced HR User was Created



If the SwipeClock 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 SwipeClock 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.











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



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

Time Clock Credentials  

[+ New](#)  Download Filter grid...


Actions	Company	User -	SC SSO	SC Admin	SC Card 2	SC Card 3
	Seuss Corporation	Abigail@sharklasers.com	Abigail			
	Seuss	alexab@sharklasers.com	AlexaB			
	Seuss	alisonf@sharklasers.com	AlisonF			
	Seuss	AmyH@sharklasers.com	AmyH			
	Seuss Corporation	AnneBlake@sharklasers.com	AnneBlake			
	Seuss Corporation	BarryN@sharklasers.com	BarryN			
	Seuss Corporation	BetsyS@sharklasers.com	BetsyS			
	Seuss	betteanne.esposito@asuresoftware.com	AJamesI	CindyLoul		
	Seuss Corporation	Bjorn@sharklasers.com	Bjorn			
	Seuss Corporation	boris@sharklasers.com	Boris			


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

Time Clock Credential: NEW RECORD

Company/User

Company

 Shelburne Farms 03 (SF03)

 braverman@sharklasers.com - John Braverman


Linked Employee

Company Name	Name
Shelburne Farms 03 (SF03)	Braverman, John (9)


Swipe Clock

Admin User

Admin Username


 mblake@evolutionhcm.com

Admin Password

 *****

SSO User

SSO Username

 SSO Username

Extra Cards/Logins

Card Number 2

Card Number 3

- In the **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 SwipeClock punches).
- Enter the user's **SSO Username**.
- 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.
- Click **Save Changes**.

Syncing the Employee to the SwipeClock Employee Record

Once the SwipeClock Configuration is complete, the system will automatically send a sync to SwipeClock of any new Employee data changes. The **Sync Employee to Swipe Clock** button is a manual option for this purpose in the system.

Setup

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

The screenshot shows the 'Other Info' section of a form. It includes a 'Worker Comp Policy ID' field with the value '516814684651', an 'Organization Level for Employee Assignment' dropdown menu set to 'Department', and a toggle for 'Enabled SwipeClock Sync for 1099 Employees'. The toggle is currently set to 'Yes' (green button) and is highlighted with a red rectangular box.

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 screenshot shows the 'Integration' section of a form. It includes a 'Timeclock' section with a button labeled 'Sync Employee To Timeclock' (highlighted with a red rectangular box), an 'Excluded From Updates' toggle set to 'No' (red button), an 'Export Block' toggle set to 'No' (red button), and a 'Web Clock Enabled' toggle set to 'Yes' (grey button).

The **Sync Employee to Swipe Clock** 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.

Integration

Swipe Clock

[Sync Employee To Swipe Clock](#)

Excluded From Updates

No Yes

Export Block

No Yes

Mobile Enabled

No Yes

Web Clock Enabled

No Yes

Mobile Punch Enabled

No Yes

Enforce Schedule

No Yes

Add GPS to Mobile Punch

No Yes

Options

Options

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

Integration

Swipe Clock

[Sync Employee To Swipe Clock](#)

Excluded From Updates

No Yes

Export Block

No Yes

Mobile Enabled

No Yes

Web Clock Enabled

No Yes

Mobile Punch Enabled

No Yes

Enforce Schedule

No Yes

Add GPS to Mobile Punch

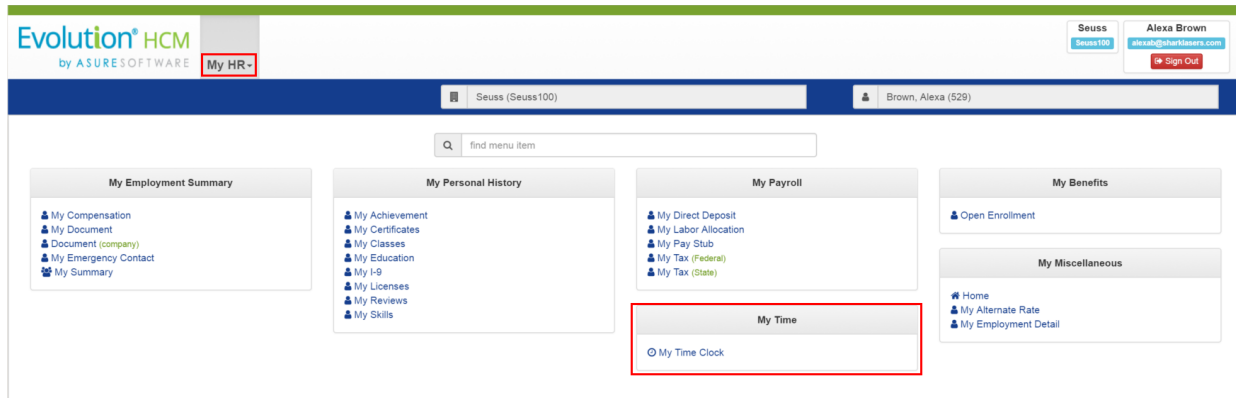
No Yes

Options

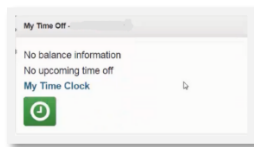
Options

The End User Experience (SwipeClock)

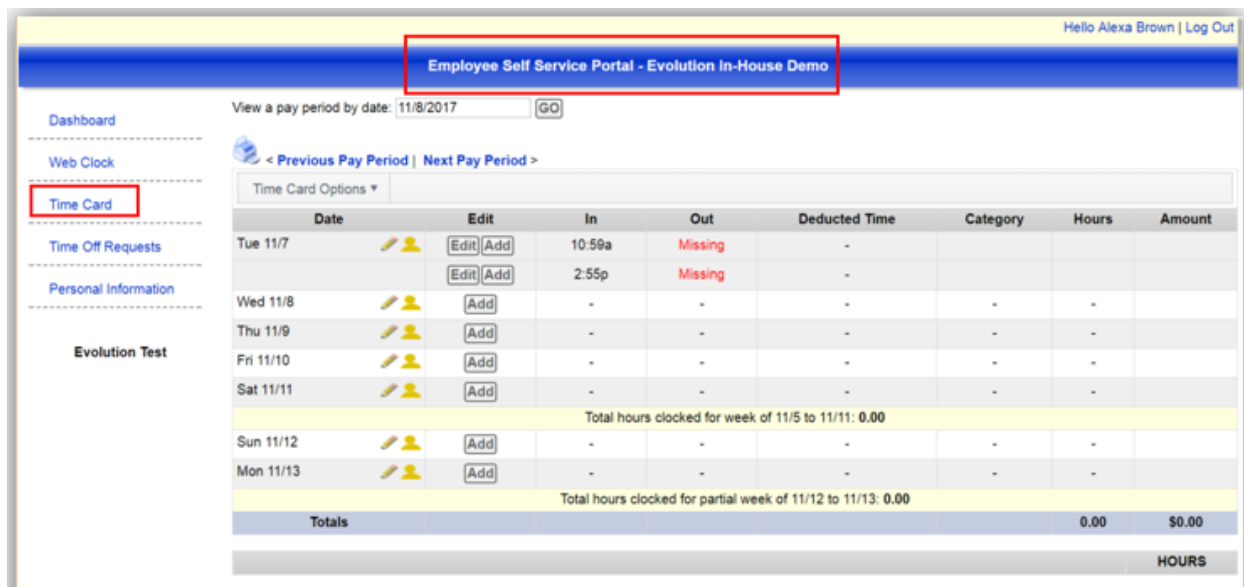
Once the user credentials have been set up, the employee will have a seamless experience while using SwipeClock. On the employee's **My HR** tab in Advanced HR, there will be a **My Time** pane with a **My Time Clock** menu option.



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.

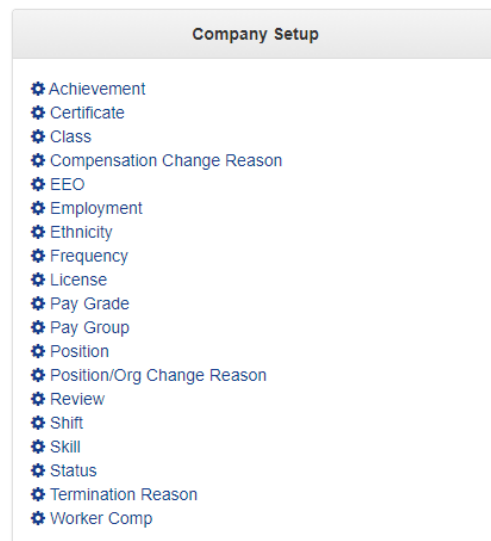




The user clicks on the **Time Card** option on the left of the screen to access their Timecard and punches. If the user also has Admin access in SwipeClock, under **My Time**, two SwipeClock links will display.

Company Setup Menu

The **Company Setup** tile allows the back end 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 Type

This option provides a high-level list of an employee's achievements – that is – employee accomplishments or recognitions. Accomplishments can also include a level of proficiency or a years of service marker.

Managers, Admins, SB Admins, and Super Admins can create and assign employee accomplishments or recognitions to employees. Any achievements will be added to the employee's record. They will appear in their **My HR** screens under the **My Personal History** menu pane.

Achievement Types  

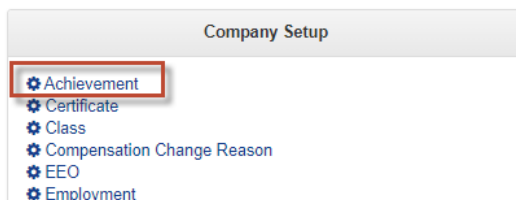
[+ New](#)  [Download](#)

Actions	Code	Description	Active	Priority
	SY	5 Year Service	No <input checked="" type="checkbox"/> Yes	
	QOSA	Quarterly Outstanding Sales Award	No <input checked="" type="checkbox"/> Yes	
	SYA	Salesperson of the Year Award	No <input checked="" type="checkbox"/> Yes	

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3


To add a new Achievement Type:

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



2. Click on the **+ New** button and complete the information.

Achievement Type: [NEW RECORD](#)

<p>Company</p> <p>Company</p> <p> MB Winery (MB01)</p>	<p>Type Info</p> <p>Code</p> <p><input type="text" value="Code"/> *</p> <p>Description</p> <p><input type="text" value="Description"/></p>	<p>Type Status</p> <p>Active</p> <p>No <input type="checkbox"/> Yes <input checked="" type="checkbox"/></p> <p>Priority</p> <p><input type="text" value="Priority"/></p>
---	--	--

3. Select the correct **Company**.
4. Enter a **Code** for the Achievement.
5. Enter a **Description** of the Achievement.
6. In the **Type Status** section, make sure the **Active** Yes/No toggle switch is set to **Yes**.
7. Assign a **Priority** to the Achievement.
8. Click **Save Changes**.

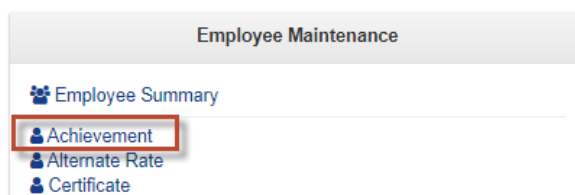
Achievement Type: QOSA

Company Company MB Winery (MB01)	Type Info Code QOSA Description Quarterly Outstanding Sales Award	Type Status Active No Yes Priority Priority
---	--	--



The new Achievement you created is now ready to be used – that is, it can be applied to an employee.



To apply an achievement to an employee:



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



You'll see a list of the any employees in the company who have had Achievements attached to them.

Achievements  

+ New   filter grid...

Actions	Name	Employee ID	Achievement Code	Achievement Description
	Oakley, Warren	1	QOSA	Quarterly Outstanding Sales Award
	Forsyth, Megan	2	QOSA	Quarterly Outstanding Sales Award

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

2. Click the green **+ New** button in the upper left portion of the screen.

Achievement: NEW RECORD

Employee Company MB Winery (MB01) Employee Please Choose (represents BLANK)	Achievement Info Achievement Type + Please Choose (represents BLANK) Awarded Date Expiration Date Notes
--	---

3. Select the **Company** if not already selected.
4. Select the **Employee**.

5. Select the **Achievement Type** from the dropdown.
You will see the newly created Achievement as one of the possible values to select.
You can also add a new Achievement on the fly by clicking the blue Plus Sign (+).
6. Select an **Awarded Date** by clicking on the calendar icon.
7. If necessary, select an **Expiration Date** by clicking on the calendar icon.
8. Add any **Notes** concerning the achievement, if desired.
9. In the lower section of the screen (not shown above) you can Drag and Drop, or Browse, to add any documents related to the achievement.
10. Click the **Save Changes** button.

Achievement: QOSA

Employee

Company
MB Winery (MB01)

Employee
Oakley, Warren (1)

Achievement Info

Achievement Type +
QOSA - Quarterly Outstanding Sales Award

Awarded Date
06/01/2017

Expiration Date
Expiration Date

Notes
His placement of our wines in the Great Big Grocery Chain earns him the Quarterly Outstanding Sales Award

The achievement is then added to the employee's record – in the example shown above, Warren Oakley of the MB Winery company was given the Quarterly Outstanding Sales Award. This will appear in his **My HR** screens under **My Personal History**.

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. Employee certifications and licenses are required for compliance in certain industries; they can also serve as important designations that impact salary decisions.

Certificate Types ⚙️

+ New filter grid...

Actions	Code	Description	Active	Priority
✖	CPR	CPR Certification	No Yes	
✖	FL	Fork Lift Certification	No Yes	
✖	PHR	PHR Certification	No Yes	

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

To add a new Certificate Type, click on the **+ New** button and complete the information.

Certificate Type: NEW RECORD

Company <div style="border: 1px solid #ccc; padding: 2px;"> Company <div style="background-color: #f0f0f0; padding: 2px;"> ISystems Demo (ENDEMOVN) </div> </div>	Type Info <div style="border: 1px solid #ccc; padding: 2px;"> Code <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> </div> <div style="border: 1px solid #ccc; padding: 2px;"> Description <div style="border: 1px solid #ccc; height: 20px;"></div> </div>	Type Status <div style="border: 1px solid #ccc; padding: 2px;"> Active <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> No Yes </div> </div> <div style="border: 1px solid #ccc; padding: 2px;"> Priority <div style="border: 1px solid #ccc; height: 20px;"></div> </div>
--	--	---

Class

The Advanced HR training class management system allows you to set up classes and track employees' participation in training. The Classes dashboard lists the existing classes.

Classes

+ New
filter grid...

Actions	Class Title	Class Description	Class Time	Location	Class Is Open
	Visitor Tour	This class will teach you how to conduct a walking tour of our winery	Eastern	Vineyard	No Yes
	Wine Appreciation	Learn everything about how to enjoy wine		Tasting Room	No Yes

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

Click on a row to display the details about the class.

Classes

+ New
filter grid...

Actions	Class Title	Class Description	Class Time	Location	Class Is Open
	Taxidermy 101	Taxidermy is the preserving of an animal's body via stuffing or mounting for the purpose of display or study. Animals are often, but not always, portrayed in a life-like state. The word taxidermy refers to the process of preserving the animal, but the word is also used to describe the end product, which are often called "mounts". The word taxidermy is derived from the Greek words "taxis" and "derma". Taxis means "to move", and "derma" means "skin" (the dermis). The word taxidermy translates to "arrangement of skin" [1] Taxidermy is practiced primarily on vertebrates[2] (mammals, birds, fish, reptiles, and less commonly on amphibians) but can also be done to larger insects and arachnids[3] under some circumstances. Taxidermy takes on a number of forms and purposes, including natural history museum displays, hunting trophies, study skins, and is sometimes used as a means to memorialize pets [4] A person who practices taxidermy is called a taxidermist. They may practice professionally for museums or as businesses catering to hunters and fishermen, or as amateurs, such as hobbyists, hunters, and fishermen. A taxidermist is aided by familiarity with anatomy, sculpture, painting, and tanning.	Eastern 09/01/2017 08:00 AM	Conference Rm 5	No Yes

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

The first step is to enter the class details by clicking on the green **+ New** icon. In addition to class title and details, you can also attach documentation for each class that will be electronically available to the employees when they are enrolled in the class.

Class: NEW RECORD

Company

Company

MB Winery (MB01)

Class Info

Title

Description

Class Details

Instructor

Duration (in hours)

Class Time **Eastern**

Class Time

Location

Credits

Class is Open

No Yes

Reset Employee Acknowledgements

Once the class is set up you can either mass enroll employees via the **Rapid Enroll** feature or individually enroll employees. The latter method allows you to enter private notes to the employee and attach additional documents.

Reset Employee Acknowledgements Button

Clicking the **Reset Employee Acknowledgements** button will reset the acknowledgement status for every employee enrolled in this 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**.

Compensation Change Reasons

Compensation Change Reasons ⚙️ \$

+ New 🔄 Download

filter grid...

Actions	Code	Description	Active	Priority
	New	New Hire	No Yes	
	poschange	Position Change	No Yes	

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2

To add a new Compensation Change Reason, click on the **+ New** button and complete the information.

Compensation Change Reason: **NEW RECORD**

Company Company MB Winery (MB01)	Type Info Code Code	Type Status Active No Yes
	Description Description	Priority Priority

EEO Type

EEO Types ⚙️ 🏆

+ New 🔄 ⬇️ Download

filter grid...

Actions	Code	Description	Active	Priority
	1.1	Executive/Senior Level Officials and Managers	No Yes	
	1.2	First/Mid-Level Officials and Managers	No Yes	
	2	Professionals	No Yes	
	3	Technicians	No Yes	
	4	Sales Workers	No Yes	
	5	Administrative Support Workers	No Yes	
	6	Craft Workers	No Yes	
	7	Operatives	No Yes	
	8	Laborers	No Yes	

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

EEO Type: **1.1**



Company Company JCoz - Cozy Inn & Hamburgers (JCoz)	Type Info Code 1.1	Type Status Active No Yes
	Description 1.1 Exec/Sr Level Officials & Managers	Priority Priority


To add a new EEO Type, click on the **+ New** button and complete the information.











EEO Type: **NEW RECORD**

Company Company MB Winery (MB01)	Type Info Code Code	Type Status Active No Yes
	Description Description	Priority Priority

Employment Type

Employment Types  

[+ New](#)  [Download](#)


Actions	Code	Description	Active	Priority
	1099	1099	No Yes	
	FullTime	Full Time	No Yes	
	FullTimeTemp	Full Time Temp	No Yes	
	HalfTime	Half Time	No Yes	
	NA	N/A	No Yes	
	Other	Other	No Yes	
	PartTime	Part Time	No Yes	
	PartTimeTemp	Part Time Temp	No Yes	
	PerDiem	Per Diem	No Yes	
	Seasonal	Seasonal	No Yes	

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

Employment Type: FullTime

Company

Company

 JCoz - Cozy Inn & Hamburgers (JCoz)

Type Info

Code

FullTime

Description

Full Time

Type Status

Active

No Yes

Priority


Priority

To add a new Employment Type, click on the **+ New** button and complete the information.

Employment Type: NEW RECORD

Company

Company

 MB Winery (MB01)

Type Info

Code

Code *

Description

Description

Type Status

Active

No Yes









Priority

Priority







Note that the Employment Type value can 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.

<div> + New Download </div> <div>filter grid...</div>				
Actions	Code -	Description	Active	Priority
	A	Asian	No <input checked="" type="checkbox"/> Yes	
	B	African American	No <input checked="" type="checkbox"/> Yes	
	H	Hispanic	No <input checked="" type="checkbox"/> Yes	
	I	Native American	No <input checked="" type="checkbox"/> Yes	
	O	Others	No <input checked="" type="checkbox"/> Yes	
	P	Pacific Islander/ Hawaiian	No <input checked="" type="checkbox"/> Yes	
	T	Two or more races	No <input checked="" type="checkbox"/> Yes	
	W	White	No <input checked="" type="checkbox"/> Yes	
<div> <div> <div>1</div> <div>of 1</div> <div>Go</div> </div> <div> <div>Page size: 8</div> <div>Change</div> </div> </div> <div>Item 1 to 8 of 8</div>				

Frequency Type

<div> + New Download </div> <div>filter grid...</div>				
Actions	Code -	Description	Active	Priority
	A	Annual	No <input checked="" type="checkbox"/> Yes	
	B	Bi-weekly	No <input checked="" type="checkbox"/> Yes	
	M	Monthly	No <input checked="" type="checkbox"/> Yes	
	Q	Quarterly	No <input checked="" type="checkbox"/> Yes	
	S	Semi-Monthly	No <input checked="" type="checkbox"/> Yes	
	W	Weekly	No <input checked="" type="checkbox"/> Yes	
<div> <div> <div>1</div> <div>of 1</div> <div>Go</div> </div> <div> <div>Page size: 6</div> <div>Change</div> </div> </div> <div>Item 1 to 6 of 6</div>				

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

Frequency Type: BiWeekly		
<div>Company</div> <div> <div>Company</div> <div>JCoz - Cozy Inn & Hamburgers (JCoz)</div> </div>	<div>Type Info</div> <div> <div>Code</div> <div>BiWeekly</div> </div> <div> <div>Description</div> <div>Bi-Weekly</div> </div> <div> <div>Pays Per Year</div> <div>Pays Per Year</div> </div>	

To add a new Frequency Type, click on the **+ New** button and complete the information.

Frequency Type: NEW RECORD

Company

Company

ISystems Demo (ENDEMOVIM)

Type Info

Code

Code

Description

Description

Pays Per Year

Pays Per Year

Type Status

Active

No Yes

Priority

Priority

License Type

Add details on any license including expiration dates and attached documents.

License Types ⚙️ 📄

+ New filter grid...

Actions	Code	Description	Active	Priority
❌	TAX	Taxidermy	No Yes	

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

To create a new License Type, click the **+ New** button.

License Type: NEW RECORD

Company

Company

ISystems Demo (ENDEMOVIM)

Type Info

Code

Code

Description

Description

Type Status

Active

No Yes

Priority

Priority

Pay Grade Type

Pay Grade Types ⚙️ 📄


+ New filter grid...

Actions	Code	Description	Active	Priority
❌	Hourly	Hourly	No Yes	
❌	Salary	Salary	No Yes	

Page: 1 of 1 Go Page size: 2 Change Item 1 to 2 of 2


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

Pay Grade Type: Hourly









<p>Company</p> <p>Company</p> <p> Shelburne Farms 03 (SF03)</p>	<p>Type Info</p> <p>Code</p> <p>Hourly</p> <p>Description</p> <p>Hourly</p>	<p>Type Status</p> <p>Active</p> <p><input type="radio"/> No <input checked="" type="radio"/> Yes</p> <p>Priority</p> <p>Priority</p>
<p>Additional Info</p> <p>Pay Range</p> <p>Please Choose (represents BLANK)</p> <p>Minimum</p> <p>\$ Minimum</p> <p>Midpoint</p> <p>\$ Midpoint</p> <p>Maximum</p> <p>\$ Maximum</p>		

Click on the **+ New** button to add a new Pay Grade Type.

Pay Grade Type: NEW RECORD

<p>Company</p> <p>Company</p> <p> Shelburne Farms 03 (do not touch) (SF03)</p>	<p>Type Info</p> <p>Code</p> <p>Code *</p> <p>Description</p> <p>Description</p>	<p>Type Status</p> <p>Active</p> <p><input type="radio"/> No <input checked="" type="radio"/> Yes</p> <p>Priority</p> <p>Priority</p>
<p>Additional Info</p> <p>Pay Range</p> <p>Please Choose (represents BLANK)</p> <p>Minimum</p> <p>\$ Minimum</p> <p>Midpoint</p> <p>\$ Midpoint</p> <p>Maximum</p> <p>\$ Maximum</p>		

Pay Group Type

Pay Group Types  				
<div>  New  Download <input type="text" value="filter grid..."/> </div>				
Actions	Code	Description	Active	Priority
	Hourly	Hourly	No Yes	
	Salary	Salary	No Yes	
<div> <div>   </div> <div> <div>1</div> <div>of 1</div> <div>Go</div> </div> <div> <div>Page size: 2</div> <div>Change</div> </div> </div>				
Item 1 to 2 of 2				

Position Type

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 currently flow from Classic into Advanced HR 2.0. 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. 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 Advanced HR 2.0 in **Employee Maintenance – Employee Detail**.



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









The system displays the **Position Types Dashboard**. This Dashboard will display all the positions for a company.

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

As you can see by the screenshot below, this company already has some positions. The user can view and edit a position at any time simply by clicking on the Position Title.

Position Types  

[+ New](#)  [Download](#)

Actions	Code	Title	Active	Priority
	CSM	Customer Service Manager	No Yes	
	LT	Lab Technician	No Yes	
	NA	NA	No Yes	
	SO	Security Office	No Yes	1
	Trainer	Trainer	No Yes	


Page: 1 of 1 Go Page size: 5 Change Item 1 to 5 of 5

Click on a Position Type row to see the details, for example, for the Trainer position.

Position Type: Trainer

Company

Company

 Shelburne Farms 03 (SF03)

Type Info

Code

Trainer

Title

Trainer

Type Status

Active

No Yes

Budgeted

No Yes

Priority

Priority

Additional Info

Dates

Approved Date

Approved Date

Effective Date

Effective Date

Closed Date

Closed Date

Assignments

Pay Grade +

Please Choose (represents BLANK)

EEO Class +

Please Choose (represents BLANK)

Worker Comp Code +

Please Choose (represents BLANK)

Supervisor

Please Choose (represents BLANK)

Other

FTE

\$ FTE

OT Exempt

No Yes

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.

Save Changes
Save & Next Record
Close X

Position Type: NEW RECORD

Company

Company

Shelburne Farms 03 (SF03)

Type Info

Code SO ✓

Title Security Officer ✓

Type Status

Active

No Yes

Additional Info

Dates

Approved Date 10/11/2017

Effective Date 10/11/2017 ✓

Closed Date Closed Date

Assignments

Pay Grade 15 - Grade 15

EEO Class FT - Full Time

Worker Comp Code 856 -

Supervisor

Dyer, Boris (2)

Other

OT Exempt No Yes

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:

Details

Position Description

The Security Officer will undertake the surveillance of our premises and protection of our staff and visitors. They are responsible for detecting any suspicious behavior and preventing vandalism, thefts or other criminal behavior.

A security officer must be well-trained in surveillance and dealing with perpetrators. They will inspire respect and authority as well as possess a high level of observation.

The goal is to help the company in maintaining excellent working conditions by keeping our facilities safe and problem-free.

Position Requirements

Proven experience as security officer or guard

Knowledge of legal guidelines for area security and public safety

Familiarity with report writing

Excellent surveillance and observation skills

Tech-savvy with experience in surveillance systems

Trained in First Aid/BLS and self-defense

Registered as a security officer

High School diploma is required

11. Click **Save Changes** when complete.

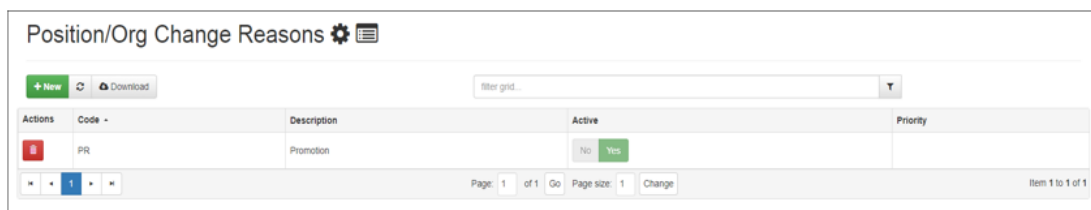
Position/Org Change Reason



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.

Position/Org Change Reason: PR

<p>Company</p> <p>Company</p> <p> Shelburne Farms 03 (SF03)</p>	<p>Type Info</p> <p>Code</p> <p>PR</p> <p>Description</p> <p>Promotion</p>	<p>Type Status</p> <p>Active</p> <p><input type="button" value="No"/> <input checked="" type="button" value="Yes"/></p> <p>Priority</p> <p>Priority</p>
---	--	---

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

Position/Org Change Reason: NEW RECORD

<p>Company</p> <p>Company</p> <p> Shelburne Farms 03 (SF03)</p>	<p>Type Info</p> <p>Code</p> <p>Code *</p> <p>Description</p> <p>Description</p>	<p>Type Status</p> <p>Active</p> <p><input type="button" value="No"/> <input checked="" type="button" value="Yes"/></p> <p>Priority</p> <p>Priority</p>
---	--	---

Review Type

Review templates can be added to each review type to improve policy compliance and facilitate administration of reviews.

Review Types ⚙️💬

[+ New](#) [Download](#)

Actions	Code	Description	Active	Priority
	30 day	30 day	No Yes	1
	90 day	90 day review form	No Yes	2
	90 day	90 day	No Yes	1
	annual review	annual review	No Yes	1
	Disciplinary	Disciplinary	No Yes	6
	Exit review	Exit review	No Yes	10
	not an important review	not an important review	No Yes	5

Page: 1 of 1 Go Page size: 7 Change Item 1 to 7 of 7

Click on a Review Type to add a review type template.

Review Type: **NEW RECORD**

Company

Company

iSystems Demo (ENDEMOVM)

Type Info

Code

Description

Type Status

Active

No Yes

Priority

Details

Review Template

Shift Type

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

Shift Types ⚙️🕒

[+ New](#) [Download](#)

Actions	Code	Description	Active	Priority
	2	Second Shift	No Yes	

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

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

Shift Type: NEW RECORD

Company

Company

Shelburne Farms 03 (SF03)

Type Info

Code

Description

Type Status

Active

Priority

Rates

Rate

Add To Rate

Rate Multiplier

Skill Type

The Skill Types dashboard lists any skill types values.

Skill Types

+ New Download

filter grid...

Actions	Code	Description	Active	Priority
	MIG	Management	<input type="button" value="No"/> <input checked="" type="button" value="Yes"/>	

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

To create a new Skill Type record, click the **+ New** button.

Skill Type: NEW RECORD

Company

Company

iSystems Demo (ENDEMOVMI)

Type Info

Code



Description



Type Status

Active











Priority

Status Type

Status Types  

[+ New](#)   Download

filter grid...


Actions	Code	Description	Active	Priority	Indicates Active Employee
	Active	Active	No Yes		No Yes
	FMLA	FMLA	No Yes		No Yes
	Involuntary Layoff	Involuntary Layoff	No Yes		No Yes
	Involuntary Termination Due to Misconduct	Involuntary Termination Due to Misconduct	No Yes		No Yes
	Jury Duty	Jury Duty	No Yes		No Yes
	Leave of Absence	Leave of Absence	No Yes		No Yes
	Long Term Disability	Long Term Disability	No Yes		No Yes
	Military Leave	Military Leave	No Yes		No Yes
	Other/See Notes	Other/See Notes	No Yes		No Yes
	Release Without Prejudice	Release Without Prejudice	No Yes		No Yes

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

Status Type: **Active**

Company

Company

 JCoz - Cozy Inn & Hamburgers (JCoz)

Type Info

Code

Active

Description

Active

Type Status

Active

No Yes

Indicates Active Employee

No Yes

Priority

Priority

To add a new Status Type, click the **+ New** button.

Status Type: **A**

Company

Company

 iSystems Demo (ENDEMOV)

Type Info

Code

A

Description

Active

Type Status

Active

No Yes

Indicates Active Employee



No Yes



Priority

Priority

Termination Change Reasons

This is a list of possible reasons for termination of an employee. These codes are used on the **Termination Wizard** screen when terminating an employee.

Termination Change Reasons  

  filter grid...

Actions	Code	Description	Active	Priority
	Involuntary Layoff	Involuntary Layoff	No Yes	
	Involuntary Termination Due to Misconduct	Involuntary Termination Due to Misconduct	No Yes	
	Release Without Prejudice	Release Without Prejudice	No Yes	
	Terminated	Terminated	No Yes	
	Termination Due to Death	Termination Due to Death	No Yes	
	Termination Due to Layoff	Termination Due to Layoff	No Yes	
	Termination Due to Retirement	Termination Due to Retirement	No Yes	
	Termination Due to Transfer	Termination Due to Transfer	No Yes	
	Voluntary Resignation	Voluntary Resignation	No Yes	



Page: 1 of 1 Go Page size: 9 Change Item 1 to 9 of 9



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

Termination Change Reason: InvoluntaryLayoff

Company Company JCoz - Cozy Inn & Hamburgers (JCoz)	Type Info Code InvoluntaryLayoff Description Involuntary Layoff	Type Status Active No Yes Priority Priority
--	--	--














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 as shown below.

Termination Change Reasons  

  filter grid...

Actions	Code	Description	Active	Priority
	Involuntary Layoff	Involuntary Layoff	No Yes	
	Involuntary Termination Due to Misconduct	Involuntary Termination Due to Misconduct	No Yes	
	Release Without Prejudice	Release Without Prejudice	No Yes	
	Terminated	Terminated	No Yes	
	Termination Due to Death	Termination Due to Death	No Yes	
	Termination Due to Layoff	Termination Due to Layoff	No Yes	
	Termination Due to Retirement	Termination Due to Retirement	No Yes	
	Termination Due to Transfer	Termination Due to Transfer	No Yes	
	Voluntary Resignation	Voluntary Resignation	No Yes	

Workers Comp

Workers Compensation Types  				
<div> + New Download <input type="text" value="filter grid..."/> </div>				
Actions	Code	Description	Active	Priority
	0005	Farm Nursery Employees & Drivers	No Yes	
	0006	Wheat/Hay Baling	No Yes	
	0008	Farm Gardening	No Yes	
	0034	Farm Poultry Or Egg Producer	No Yes	
	0079	Farm Berry Or Vineyard And Drivers	No Yes	
	2003	Bakery	No Yes	
	2121	Brewery & Drivers	No Yes	
	73.90	Beer Or Ale Dealer Wholesale & Drivers	No Yes	
	8006	Store Grocery - Retail	No Yes	
	9058	Hotel & Restaurant Employees	No Yes	
	9079	Restaurant OR Taverns	No Yes	

Click on a row to see the details of a Worker's Compensation Type.

Worker Comp Type: CC

Company
Company
JCoz - Cozy Inn & Hamburgers (JCoz)

Type Status
Active
No Yes
Priority
Priority

Type Info
Code
CC
Description
CC

Rating
State
Please Choose (represents BLANK)
Rate
\$ Rate
Experience Rating
\$ Experience Rating

GL
GL Code
GL Code
GL Offset Tag
GL Offset Tag

Other Info
E/D Group
Please Choose (represents BLANK)
Overtime To Reduce
None

Click on the **+ New** button to add a new Worker's Comp Type.

Worker Comp Type: **NEW RECORD**

Company Company Shelburne Farms 03 (do not touch) (SF03) ▼	Type Info Code Code * Description Description *	GL GL Code GL Code GL Offset Tag GL Offset Tag
Type Status Active No Yes Priority Priority	Rating State Please Choose (represents BLANK) * ▼ Rate \$ Rate Experience Rating \$ Experience Rating	Other Info E/D Group Please Choose (represents BLANK) ▼ Overtime To Reduce None ▼

Employee Actions Menu

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



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

- Adding a New Hire Manually
- Self-Service Setup
- Onboarding
- Terminating an Employee
- Rehiring an Employee

Each item is described below.

Adding a New Hire Manually

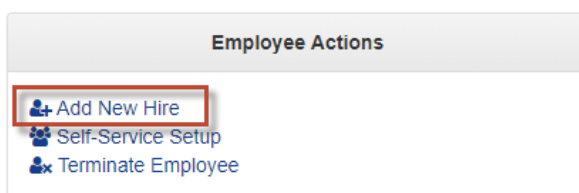
Administrators can add a new hire manually to Advanced HR 2.0 by following these steps. Managers may also be able to do some onboarding tasks, such as Prep Employees for Onboarding.

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

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



- 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.

New Hire Process 

Add New Hire

STEP 1 - Type of Hire
The information below helps to guide you through the rest of the New Hire process.

Company
MB Winery (MB01)

Tax Form (Type of Hire)
W2 - Employee

Hire Date
08/28/2017

Position +
IT - IT Manager

Employee ID
6

[Let's begin New Hire →](#)

Add New Hire screen

Position +

Please Choose (represents BLANK)

Please Choose (represents BLANK)

CSM - Customer Service Manager

LT - Lab Technician

NA - NA

Trainer - Trainer

The **Position** can be selected from the dropdown menu, or added on the fly by clicking the **Blue Plus Sign**.



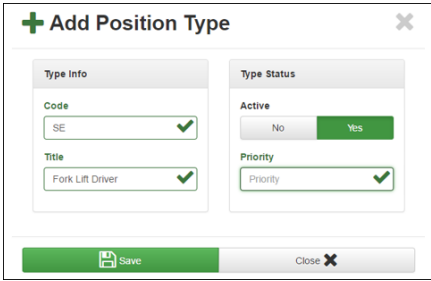
Note: Required fields in Advanced HR 2.0 are indicated with a red asterisk (*).

Tax Form (Type of Hire)

Please Choose (represents BLANK) *

STEP 1 – Type of Hire

- 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) *	<p>Select the Tax Form the employee will use depending on which employee type the new hire is.</p> <ul style="list-style-type: none"> W2 – Employee 1099 – Contractor <p>The Tax Form may default to one value for this company.</p>
Hire Date	Enter the date of hire or select the date using the calendar.
Position *	<p>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.</p> <p>You can also add a new Position on the fly by clicking the Blue Plus Sign  icon.</p>  <p>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.</p>  <p>If you add a Position Type on the fly above, click Save when complete. The new position will now be available.</p> <p>Administrators create Positions for a company using the HR Admin – Company Setup – Position screen.</p>
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.

Let’s begin New Hire ➔

Result: The system redisplay 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.

The screenshot displays the 'Profile' section of the system, which is divided into four main columns of input fields:

- Name:** Includes fields for Prefix (with a dropdown menu), First Name, Middle Name, Last Name, Suffix, and Nickname. Each field has a red asterisk indicating it is required.
- Address:** Includes fields for Address Line 1, Address Line 2, City, State (with a dropdown menu), and Zip Code. Each field has a red asterisk indicating it is required.
- ID:** Includes fields for SSN, Birthdate, and Clock Number. Each field has a red asterisk indicating it is required.
- Contact Info:** Includes fields for Email, Home Phone, Work Phone, and Cell Phone. Each field has a red asterisk indicating it is required.

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 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.

Payroll	Benefits
Pay Frequency Please Choose (represents BLANK) *	Eligible For Benefits Eligible For Benefits
Standard Payroll Hours Standard Hours	Medical Coverage Offered Please Choose (represents BLANK)
	Benefit Class / Eligibility Group Please Choose (represents BLANK)

Employment section

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

Employment			
Position/Status Employment Type Full Time - Full Time	Organization Division Please Choose (represents BLANK) *	Compliance EEO Category + Please Choose (represents BLANK)	Reports To/Supervisor Reports To 1 Please Choose (represents BLANK)
Status Active - Active	Branch Please Choose (represents BLANK) *	Worker Comp Code + Please Choose (represents BLANK)	Reports To 2 Please Choose (represents BLANK)
FLSA Classification Please Choose (represents BLANK)	Department Please Choose (represents BLANK) *		Reports To 3 Please Choose (represents BLANK)
Eligible for Rehire No Yes			Supervisor (SC) ⓘ Supervisor (SC)

Emergency Contact section

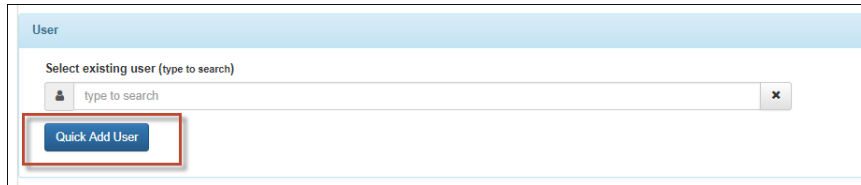
Complete the new hire's emergency contact information (contact type, name, address, email, and phone information).

Emergency Contact		
Name/Type Contact Type Spouse, Mother, Father	Address Address Line 1 Address Line 1 *	Contact Info Email your.email@domain.com
Priority Priority	Address Line 2 Address Line 2	Home Phone 123.456.7890 x123
First Name First Name ⓘ	City City *	Work Phone 123.456.7890 x123
Middle Name Middle Name	State Please Choose (represents BLANK) *	Cell Phone 123.456.7890 x123
Last Name Last Name	Zip Code Zip *	

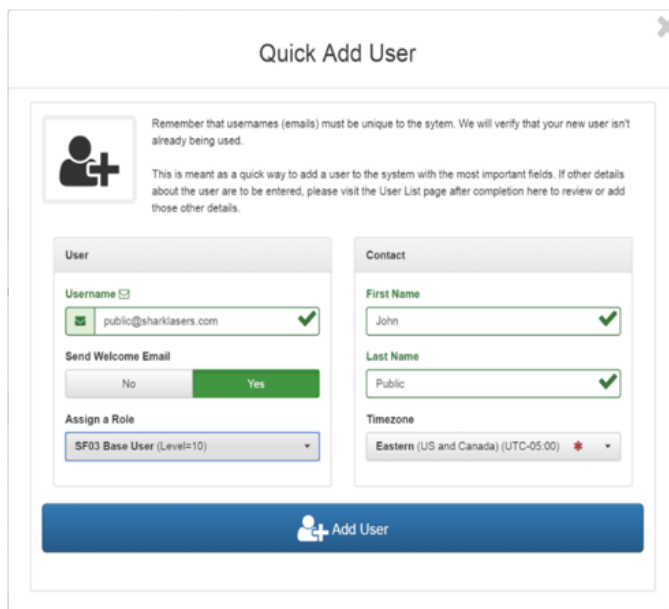
User section

This 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 **Time zone**. You can even **Send a Welcome Email** from this pop up that will give instructions to the new hire on logging in to 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.

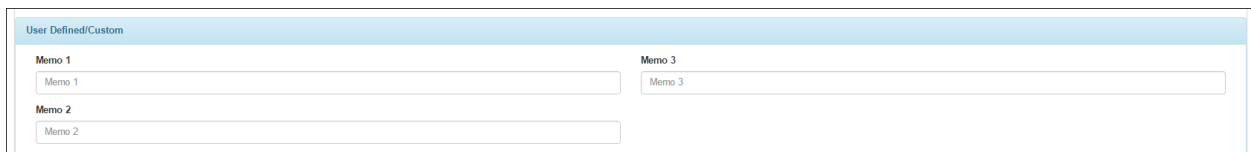
Click the blue **Add User** button when complete. You'll be taken back to the **Employee Summary** screen. Remember to click the green **Link User** button to link:

- The **user**
- The **employee**
- The **company**

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 **Company - User List** screen after completion to review or add other details.

User Defined/Custom section

This optional section is for creating user defined fields.

The screenshot shows a light blue header bar with the text "User Defined/Custom". Below this, there are three text input fields. The first two are on the left, labeled "Memo 1" and "Memo 2". The third is on the right, labeled "Memo 3". Each field has a small "x" icon in the top right corner to clear the text.

Integration section

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

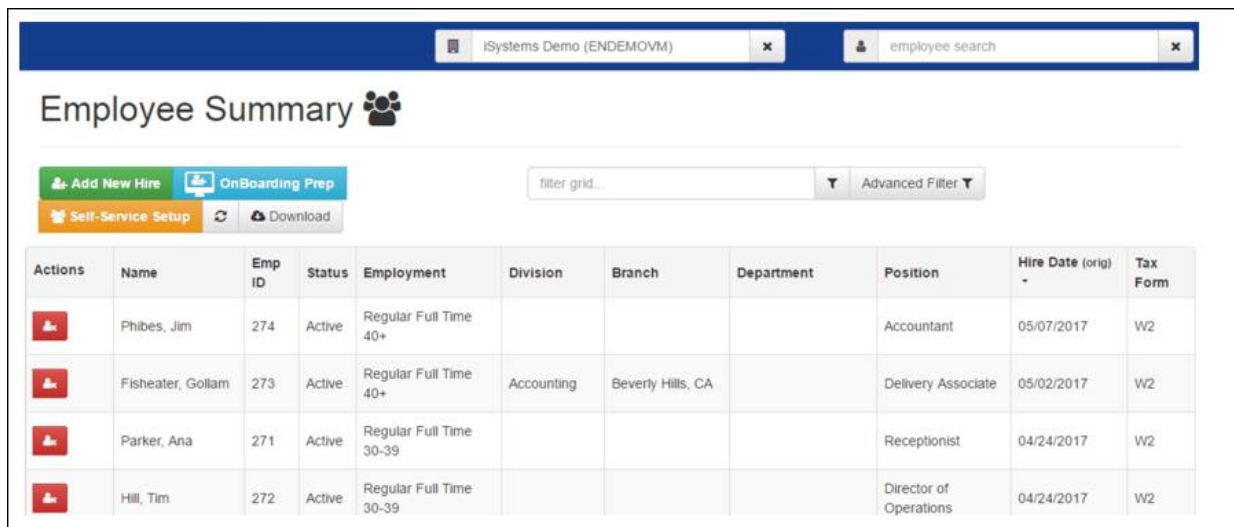
Save Options

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 add new hire 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

Submit 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**.



Actions	Name	Emp ID	Status	Employment	Division	Branch	Department	Position	Hire Date (orig)	Tax Form
	Phibes, Jim	274	Active	Regular Full Time 40+				Accountant	05/07/2017	W2
	Fisheater, Gollam	273	Active	Regular Full Time 40+	Accounting	Beverly Hills, CA		Delivery Associate	05/02/2017	W2
	Parker, Ana	271	Active	Regular Full Time 30-39				Receptionist	04/24/2017	W2
	Hill, Tim	272	Active	Regular Full Time 30-39				Director of Operations	04/24/2017	W2

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.

Remember, **Onboarding Prep** functions as a method for new hires to complete and submit all their information for employment.

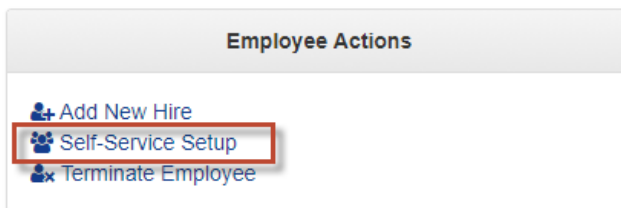
Self-Service Setup

Self-Service Setup is 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.

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. By clicking on **Self-Service Setup**, the user can invite any number of employees 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.

 A screenshot of the 'Self-Service Setup' dashboard. The dashboard has a green header bar with the title 'Self-Service Setup'. Below the header, there is a section titled 'Company/Employees' with a description: 'Choose a company, assign default settings, and confirm 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 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.' Below this, there is a 'Company' dropdown menu with 'Shelburne Farms 03 (SF03)' selected. Under 'Default settings for new Self-Service users', there is a 'Send Welcome Email' section with 'No' and 'Yes' buttons, where 'Yes' is selected. There is also a 'Timezone' dropdown menu with 'Eastern (US and Canada) (UTC-05:00)' selected. At the bottom, there is an 'Assign a Role' dropdown menu with 'Please Choose (represent: BLANK)' selected.

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 out to each employee with instructions on how to login to Advanced HR 2.0 and set their password.

Default settings for new Self-Service users

Send Welcome Email

No Yes

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

Timezone

Eastern (US and Canada) (UTC-05:00)

Assign a Role

Please Choose (represents BLANK)

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.

Assign a Role

Please Choose (represents BLANK)

Please Choose (represents BLANK)

Restricted view manager (Level=25)

SF03 Base Admin (Level=50)

SF03 Base Manager (Level=25)

SF03 Base User (Level=10)

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.

Employees to be setup with Self-Service

Employee	Email
Worthington, Warren (3)	Archangel@pokemail.net
Drake, Robert (4)	Archangel@pokemail.net
Summers, Scott (5)	Cyclops@sharklasers.com
Lee, Jubilation (6)	Jubilee@sharklasers.com

Employees EXCLUDED from Self-Service setup

Employee	Email
Banner, Bruce (2)	Yourmom@pokemail.net

Setup Self-Service

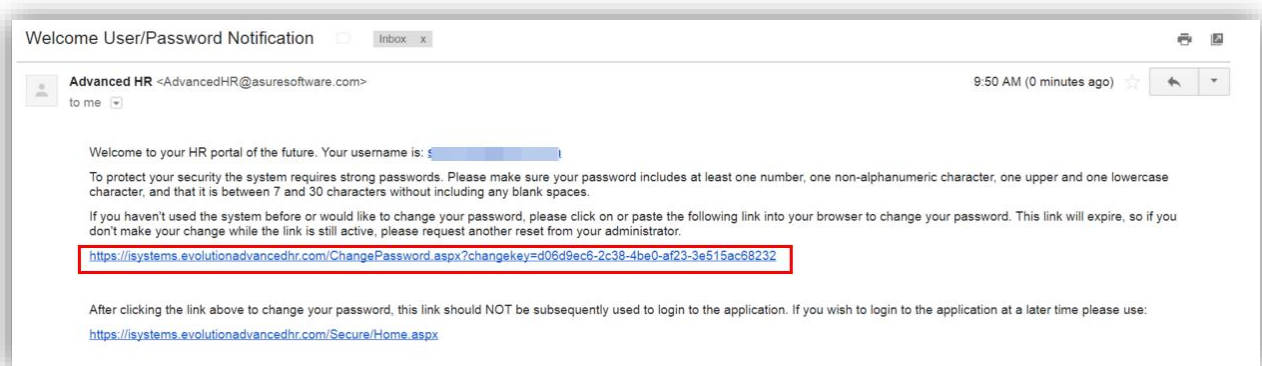
The default list of employees (**Employees to be setup with Self-Service** section shown on the left side of the screen) includes all Active employees who do not currently have Self-Service setup for them. If the employee does not currently have an email address on record, they will not appear in this 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 is only good for 24 hours.

Contained within the Welcome email are instructions for the employee to login to the system and set their password. The wording of this Notification can be edited in **HR Admin – Communication – Notifications**. [Notification functionality](#) is reviewed earlier in this guide.

Note: You should remove any Employee who will need access to Payroll Data. Employees with Payroll access will sign on using their Evolution Credentials and Evolution Single Sign On functionality.

Onboarding

The Self-Service Onboarding process is very similar to manually adding a new hire. However, there are some differences that should be noted for Self-Service Onboarding:

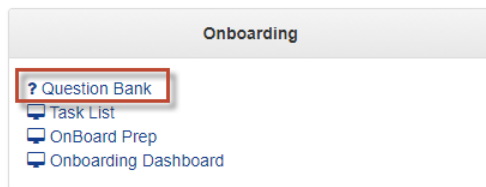
- By going to **HR Admin - Employee Actions - Self Service Setup**, the user can send a mass welcome email, with self-service instructions to *all new hires* that have not gone through onboarding yet. This task was described previously in the [Self-Service Setup](#) section.
- By going to **HR Admin – 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 complete the new hire information.

Once the welcome email is sent, the user can keep track of new hires through the **Onboarding Dashboard**.

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.



Question Bank ?

+ New Download

Actions	Question Title -	Question Type	Question Text	Sequence	Active
	Management Style	Multiple Choice	What is your preferred management style? ...	1	No
	Prior Experience	Yes/No	Do you have prior experience in the field? ...	5	No
	Start Date	Date	When are you available to start? ...	3	No

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

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

Question Bank: Management Style

Company

Company

Shelburne Farms 03 (SF03)

Type/Status

Question Type

4 - Multiple Choice

Active

☐ No ☒ Yes

Sequence

1

Is Required

☒ No ☐ Yes

Question

Question Title

Management Style

Question Text

What is your preferred management style?

Multiple Choice Answers

Hands off	
Micro manager	
Empowerment	

New Multiple Choice Answer

Answer Text Here +

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.

Onboarding Task List

+ New filter grid...

Actions	Title	Description
	Burlington Office New Hires	This task list is for use with our Burlington Office hires.
	New Hire	General onboarding task for new hires.
	Onboarding	For all new hires.

Page: 1 of 1 Go Page size: 3 Change Item 1 to 3 of 3

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:

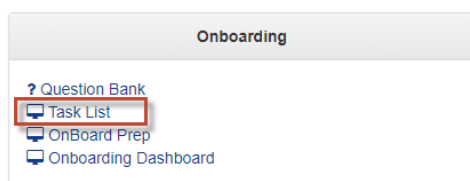
- Welcome notes
- Direct Deposit entry
- Electronic W-4 and I-9 entry forms with e-signature
- Custom questions that are specific to the Onboarding Task
- End notes

- 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.

Actions	Title	Description
	New Hire full time	New Hire full time

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



Onboarding Task List: New Hire

Company

Company

Shelburne Farms 03 (SF03)

Task List

Title

New Hire

Description

General onboarding task for new hires.

Custom Doc Upload Note

List Documents

Please upload the following documents:

Certifications

Licenses

Introduction

Steps

Mark and setup the sections below that you want included in this onboarding task list.

No Yes Include Welcome Note

No Yes Include Direct Deposits

No Yes Include W4

No Yes Include I9

No Yes Include Background Check Authorization

No Yes Include Company Documents

Select/Change Company Documents

Employee Handbook pdf, Letter from the CEO pdf

Saved Company Document Selection

Filename	Size (KB)
Letter from the CEO pdf	1
Employee Handbook pdf	1

No Yes Include Custom Questions

No Yes Include Custom Document Upload

No Yes Include End Note and E-Signature

Custom Question Selection

Choose Question and LINK to this task list

Please Choose (represents BLANK)

Link Question

Linked Questions

Question Title	Type	Sequence	
Start Date	Date	1	
Interests	Free Form Text	2	
Availability	Yes/No	3	

Welcome and End Notes

Welcome Note

Welcome Note

Welcome to Shelburne Inn and Shoppes. We're glad that you will be part of our team. Please fill out the following information to the best of your ability. Once submitted, our HR Manager will be contacting you.

Thank you,

End Note

End Note

This completes your new hire onboarding. Welcome to the team! Our HR Manager will be contacting you shortly to confirm your start date.

Thank you,

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.

Steps

Mark and setup the sections below that you want included in this onboarding task list.

No	Yes	Include Welcome Note
No	Yes	Include Direct Deposits
No	Yes	Include W4
No	Yes	Include I9
No	Yes	Include Background Check Authorization
No	Yes	Include Company Documents

Select/Change Company Documents
Employee Handbook.pdf, Letter from the CEO.pdf

Filename	Size (KB)
Letter from the CEO.pdf	1
Employee Handbook.pdf	1

Custom Doc Upload Note

List Documents

Please upload the following documents:

- Certifications
- Licenses
- Introduction

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.

Steps

Mark and setup the sections below that you want included in this onboarding task list.

No	Yes	Include Custom Questions
No	Yes	Include Custom Document Upload
No	Yes	Include End Note and E-Signature

Custom Doc Upload Note

List Documents

Please upload the following documents:

- Certifications
- Licenses
- Introduction

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

Question Title	Type	Sequence	
Start Date	Date	1	
Interests	Free Form Text	2	
Availability	Yes/No	3	

Welcome Note and End Note

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.

- 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.

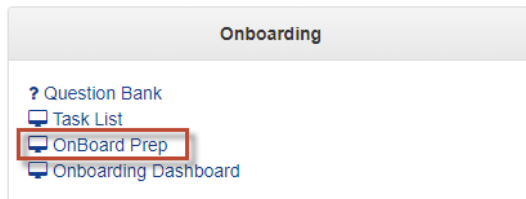
The next sections discusses the actual self-service onboarding process in detail.

Using Onboarding Prep to Start Self-Service Onboarding

To start a Self-Service Onboarding, the first place you go to is **Onboard Prep** to begin the onboarding process and get the new hire's preliminary information into the system. With Onboarding Prep, the user will fill out the basic information and the new hire will complete it.

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.

A screenshot of the 'OnBoarding Prep Process' screen. At the top, it says 'OnBoarding Prep Process' with a person icon. Below is a green header bar with the text 'Prep Employee for OnBoarding'. The main content area is titled 'STEP 1 - Type of Hire' and includes a sub-header: 'The information below helps to guide you through the rest of the OnBoarding process.' There are four required fields, each marked with a red asterisk: 'Company' (a dropdown menu showing 'JCoz - Cozy Inn & Hamburgers (JCoz)'), 'Tax Form (Type of Hire)' (a dropdown menu showing 'Please Choose (represents BLANK)'), 'Hire Date' (a text field with '09/28/2017' and a calendar icon), 'Position' (a dropdown menu showing 'Please Choose (represents BLANK)'), 'Employee ID' (a text field with '7951'), and 'Onboarding Task List' (a dropdown menu showing 'Please Choose (represents BLANK)'). At the bottom right, there is a blue button with the text 'Let's begin Onboarding' and a right-pointing arrow.

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 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.

STEP 2 - Fill out Employee information

Complete each section. Don't worry, we'll tell you if you forget anything important.

Profile**Contact**

First Name

Last Name

Email

First Name

Last Name

your.email@domain.com

Compensation

Pay Type +

H - Hourly

Default Hours

Default Hours

Pay Frequency +

B - Biweekly

Auto Pay

Hours - Pay default hours each paycheck

Rate

\$ Rate

5. Enter the following information. Refer to the screenshots earlier in this document for section by section screenshot examples:

- Profile information (name, address, SSN...)
- Compensation information (pay type and rate)

Compensation

Pay Type
Please Choose (represents BLANK)

Rate (Hourly or Salary per pay period)
\$ Rate

- Payroll and Benefits information

Payroll

Pay Frequency
Please Choose (represents BLANK)

Standard Payroll Hours
Standard Hours

Benefits

Eligible For Benefits
Eligible For Benefits

Medical Coverage Offered
Please Choose (represents BLANK)

Benefit Class / Eligibility Group
Please Choose (represents BLANK)

- Tax information (Federal, State...)

Taxes

State Tax

State
Please Choose (represents BLANK)

SUI State
Please Choose (represents BLANK)

SDI State
Please Choose (represents BLANK)

- Employment information (position status, DBDT level, reports to...)

The screenshot shows the 'Employment' form with the following fields:

- Position/Status:** Employment Type (Please Choose), Status (Please Choose), FLSA Classification (Please Choose), Eligible for Rehire (No/Yes buttons).
- Organization:** Division (Please Choose), Branch (Please Choose), Department (Please Choose).
- Compliance:** EEO Category (9 - 9 Service Workers), Worker Comp Code (CC - CC).
- Reports To/Supervisor:** Reports To 1 (Carr, Una (35)), Reports To 2 (Please Choose), Reports To 3 (Please Choose), Supervisor (SC) (Supervisor (SC)).

- **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, it is recommended.
 - Or, by using the **Quick Add User** function, you can quickly add a user – create a username (email address) and assign them a role for security rights access to the system. Click the **Quick Add User** button.

The screenshot shows the 'User' form with a search bar labeled 'Select existing user (type to search)' and a 'Quick Add User' button.

- 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:

The screenshot shows three buttons at the bottom of the screen:

- Submit OnBoarding Request
- Submit OnBoarding Request and start another
- I did something wrong. Let me start over

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.

OnBoarding Dashboard

The **OnBoarding Dashboard** provides a summary for the Administrator of all employees who are in the process of being onboarded. You can use the filter grid or click the **Advanced Filter** button at the top of the screen to filter the list of employees.

Advanced Filter

OnBoarding Dashboard

OnBoarding Prep
Download

Actions	NameID	EmailAddress	Status	Hire Date	Tax Form
	Shortlegs, Gimli - (269)	ccz8@hotmail.com	Prepped - 05/01/2017 01:44 PM <div style="width: 100%; height: 10px; background-color: #007bff; position: relative;"> 1 </div>	05/01/2017	W2
	Marconi, Johnson - (276)	John@sharklaskers.com	Prepped - 05/10/2017 03:16 PM <div style="width: 100%; height: 10px; background-color: #007bff; position: relative;"> 1 </div>	05/10/2017	W2
	Smith, Hank - (268)	7jwaiv+73zjcsx5tshs@sharklaskers.com	Requires Approval - 05/01/2017 01:27 PM <div style="width: 100%; height: 10px; background-color: #dc3545; position: relative;"> 4 </div> <div style="display: flex; justify-content: space-between; font-size: 8px; margin-top: 2px;"> Approve Reset Status </div>	05/01/2017	W2
	Oakley, Warren - (275)	Warren@sharklaskers.com	Approved - 05/08/2017 11:48 AM <div style="width: 100%; height: 10px; background-color: #28a745; position: relative;"> 5 </div>	05/08/2017	W2

Page: 1 of 1
Go
Page size: 4
Change

Item 1 to 4 of 4

It allows you to:

- Send an **Welcome Email** by clicking on the envelope icon under **Actions** with login instructions for the new hire.
- **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 the example above you can see that the employees shown are all in different statuses of onboarding. The first two have started, but not completed, their portion of the onboarding process. The third one (Hank Smith) has submitted their onboarding input and is waiting for approval. And finally, the last one (Warren Oakley) has been approved by the hiring manager and is ready to start.

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
- W4 setup (with E-Signature)
- I-9 setup (with E-Signature)

- Background check (with E-Signature)
- Company Document (for download, review, and E-signature)

In addition, for the sections concerning:

- Taxes
- Direct Deposits
- W4 information
- I-9
- Background check
- Company Documents

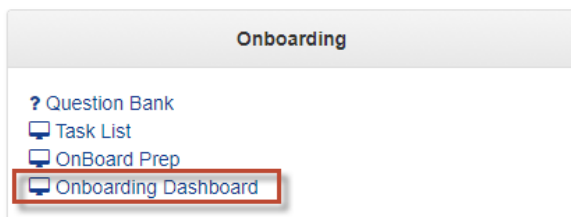
The new hire will need to e-sign each before they can proceed to the next section.

Manager/Admin Reviews and Approves the New Hire

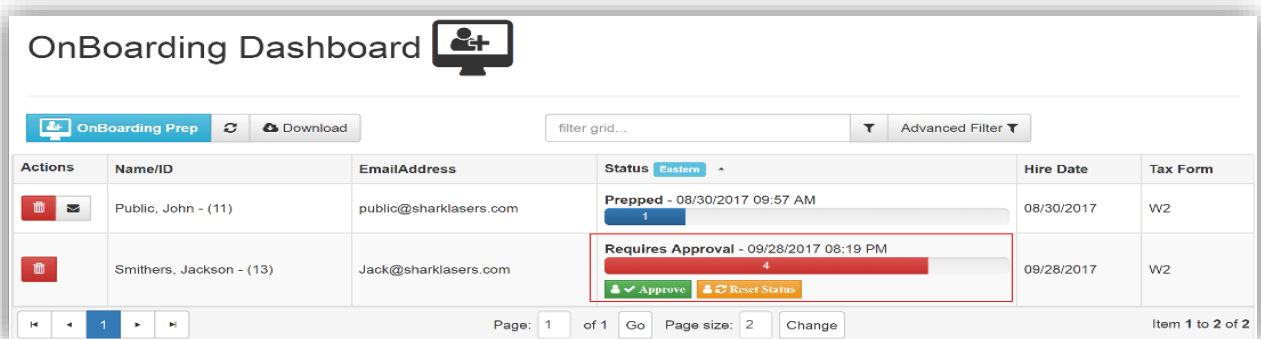
For the Manager/Admin, they will need to use the Onboarding Dashboard to review and approve the new hire.

To display the Onboarding Dashboard:





1. Navigate to **HR Admin – Onboarding – Onboarding Dashboard**.

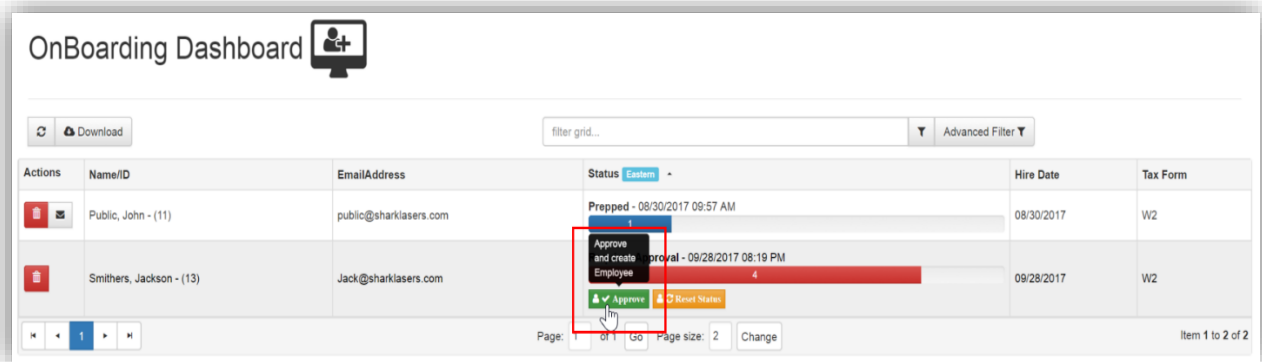



2. The system displays the **Onboarding Dashboard** summary page.



From the Onboarding Dashboard summary page you can:

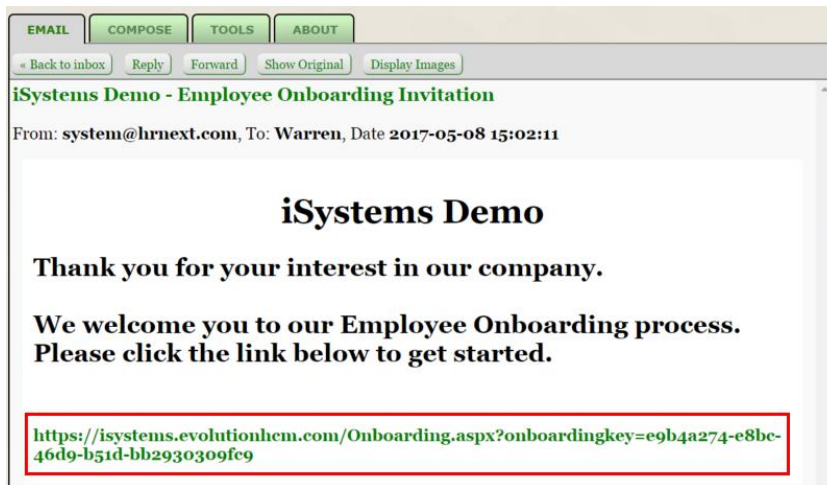
- Send an onboarding invitation by clicking on the envelope icon  under the **Actions** column. This will send an email with login information for the new hire so they can complete their paperwork.
- Delete the onboarding status record by clicking on the trash can icon  under the **Actions** column.
- 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.

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:



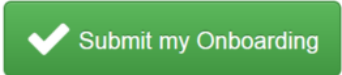
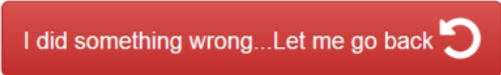
The employee will be walked through completing their pertinent information. Remember, this information was defined in the [Onboarding Task List](#):

- 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 (with E-Signature)
- I-9 setup (with E-Signature)
- Background check (with E-Signature)
- Company Document (for download, review, and E-signature)

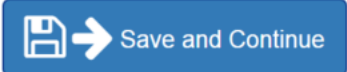
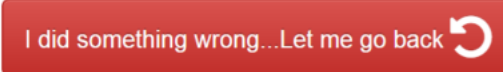
When all information has been entered, the employee will have the option of submitting or going back and editing:

REVIEW - Final Step

Please review each section for accuracy and then click the Submit button below.

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**:

REVIEW - Final Step

Please review each section for accuracy and then click the Submit button below.






Success



Everything has been sent to us successfully. After things are reviewed, you will be contacted with next steps. Thank you.

Onboarding Documents

Any documents that were generated in the process will be available to you here. Feel free to download them. Don't worry though, because we will keep a record of them in the system for you.

Download	Filename	Size (KB)	Category
	2013_06_26_19_58_12_116.gpx	13	Onboarding-Company Document
	2017_04_19 14:57 Meet Now.mp4	1547	Onboarding-Company Document
	formbackgroundcheckauth.pdf	505	Onboarding-Background Check Auth
	formi9.pdf	761	Onboarding-I9
	formw4.pdf	695	Onboarding-W4

Approving the Employee's Onboarding

Base Managers and above roles can approve the new hire. Go to **HR Admin - OnBoarding - Dashboard**. To review and approve the employee's onboarding, simply click on their name.

	iSystems Demo	Oakley, Warren - (275)	Warren@sharklasers.com	Requires Approval - 05/08/2017 11:42 AM 4 	05/08/2017	W2
--	---------------	------------------------	------------------------	--	------------	----

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.

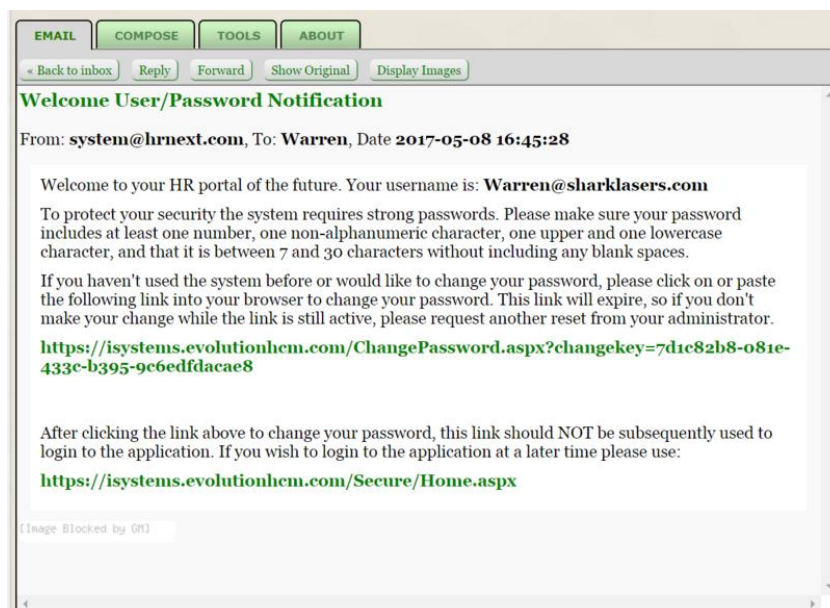
Clicking on the **Approve** button will allow the HR Administrator to review and approve the employee's information. When the user is satisfied, they click **Save Changes**.



The employee is now fully Onboarded.

OnBoarding: **Oakley, Warren (275) - Warren@sharklasers.com** **Approved**

Once onboarded, the employee will receive a Welcome User/Password Notification email similar to the following sample. This email provides the login information for the new employee:



Following the above link, the employee is taken to the **Change/Set Password** screen. This screen allows the new employee to set their password for access to Advanced HR 2.0. They will then be able to go to their Dashboard (ESS):

The screenshot shows the 'Change Password Process' screen for Evolution HCM Technology. It is divided into three steps:

- STEP 1 - Enter your username/email**: A text box contains 'Warren@sharklakers.com'. Below it, a note says: 'In addition to the secure link and unique code provided to you, we will also validate your username in this process.'
- STEP 2 - Enter NEW password**: A note says: 'Enter the new password you would like set for your account. You will be asked to enter it twice to verify the accuracy.' It includes a 'Password' field with a strength indicator showing 'Very Strong', and a 'Re-enter Password' field.
- STEP 3 - Confirm and Click**: A note says: 'Complete password change process by confirming your information and clicking below.' A large green button labeled 'Change Password' is at the bottom.

Once **Change Password** is selected, the employee will be taken to the Advanced HR login screen:

The screenshot shows the 'Sign In' screen for Evolution HCM Technology. It features a 'Username' field, a 'Password' field with a visibility toggle, a blue 'SIGN IN' button, and a 'Forgot Password?' link.

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.

Default settings for new Self-Service users

TFA Active: No (selected), Yes

Send Welcome Email: No, Yes (selected)

Assign a Role: ENDEMOVM - BaseUser (Level=10) (selected)

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**.

Employee Actions

- Add New Hire
- Self-Service Setup
- Terminate Employee**

Note: Terminating an employee can also be accessed from the **Quick Links** 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.

Termination Process


Terminate Employee

STEP 1 - Employee Info
The information below helps to guide you through the rest of the Termination process. Remember, you can only terminate a current ACTIVE employee.

Company: Please Choose (represents BLANK) *
Employee: Please Choose *
Termination Date: 10/06/2017

Let's begin Termination →

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.

Termination Process 

Terminate Employee

STEP 1 - Employee Info
The information below helps to guide you through the rest of the Termination process. Remember, you can only terminate a current ACTIVE employee.

Company: Shelburne Farms 01 (SF01) Employee: Lee, Jubilation (6) Termination Date: 10/06/2017

[Let's begin Termination !\[\]\(41f056cec2ea9da453f2d4b9c95284fa_img.jpg\)](#)

4. Click the **Let's begin Termination** button.

[Let's begin Termination !\[\]\(0f848bbd71cef6b345273b16f905912a_img.jpg\)](#)

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.




Terminate Employee

STEP 1 - Employee Info
The information below helps to guide you through the rest of the Termination process. Remember, you can only terminate a current ACTIVE employee.

Company: Shelburne Farms 01 (SF01) Employee: Lee, Jubilation (6) Termination Date: 10/06/2017

STEP 2 - Fill out Termination Information
Choose an appropriate status and optionally provide a reason and comment. Don't worry, we'll tell you if you forget anything important.

Employment

Status : Termination Due to Layoff - Termination Due to Layoff  Termination Reason : Termination Due to Layoff - Termination Due to Layoff Eligible for Rehire: No Yes

Comment:

[Submit Termination !\[\]\(cfa955f55532ade2bec35ca13a4f02ea_img.jpg\)](#)
[I did something wrong... Let me start over !\[\]\(3a4ba483e71ae3c9b8b167b53f00238c_img.jpg\)](#)

6. Click the **Submit Termination** button when complete.

[Submit Termination !\[\]\(3211b5d1d968fc1665909b34f9f16010_img.jpg\)](#)

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

To Rehire an employee, make sure you are first locked into that company and employee using the Company and the Employee search boxes in the upper-right section of the **Dashboard**:



If the employee is Eligible for Rehire, go to the **HR Admin - Employee Maintenance - Employment Detail**. Since you are locked in, the employee's name will appear in the **Employee** dropdown:

Employment Detail

New Hire/Termination

If you want to hire or terminate an employee, please go to the special processing pages that are setup to help you with those respective processes.

[Go to New Hire](#) [Go to Termination](#)

Make sure the green **Is this a Rehire toggle is set to **Yes**.**

Click the blue **Let's begin adding a Position/Organization button.**

ADD Position/Organization

If you would like to add a Position/Organization record, please choose a company and employee to give a better context for the effective date that you will be choosing. We will be copying information from the previous effective dated record, so please keep that in mind when choosing an effective date. You cannot pick a date that would become the first historical dated record for this employee. Also remember that it is NOT a good idea to have multiple records for the same employee on the same day. The system can get confused on which one should be current/active.

If you wish to re-hire (or add any record) for an inactive employee, please use the top employee search to find the inactive employee rather than the dropdown selection.

Company: **WR Shelburne Inn & Shoppes (Will)** Employee: **Longbottom, Jasper (144)**

Effective Date: **02/21/2018** Is this a RE-HIRE? **Yes**

[Let's begin adding a Position/Organization](#)

Set the **Is this a Re-Hire?** toggle switch to **Yes**.

Position/Status

Position

TS - Training Specialist

Employment Type

NA - N/A

Status

Active - Active

When the employee's **Employment Detail** screen opens, scroll down to the **Position/Status** tile. Select **Active** from the Status dropdown.

Click the green **Save Changes** button when complete.

The employee is now **Active**. You can verify this by viewing the employee's status in Evolution Classic. Go to **Employee – Employee - EE Entry** tab:

The screenshot displays the 'Employee - EE Entry' form for Jasper Longbottom. The 'Hire Status' section, highlighted with a red box, contains the following information:

Hire Status	
Current Hire Date *	Original Hire Date
2/21/2018	5/9/2017
Current Term Date	Eligible for Rehire *
2/20/2018	Yes
Current Status Code *	
Active	
Position Status *	
N/A	

Other sections visible in the form include:

- Employee:** SSN (855-65-4558), EE Code (144), Last Name (Longbottom), First Name (Jasper), Address 1 (1 Exploding Poplart), City (Thebes), State (VT), Zip (05248), Gender (Male), Date of Birth (5/20/1988), County (N/A), Ethnicity (Black or African American), Tribe.
- Pay:** Pay Frequency (Bi-Weekly), Standard Hours, Salary Amount, Average Hours (0.00), Rate Number (1), Rate Amount (20.00), Position for Pay Grade, Pay Grade.
- Position:** Healthcare Coverage (No ER Paid Ins/Not Eligible), Dependent Coverage Available (No), Eligible for Benefits (No).
- Labor Defaults:** Division (Retail), Branch (Cheese), Department (Taster), Team, Default WC, Default Job, Union.
- Taxation Details:** Federal Marital Status (Single), Federal Dependents (0), State (VT), SDI (VT), SUI (VT), State Marital Status (S), State Dep (0), Reciprocal Method (Take None), Reciprocal State.

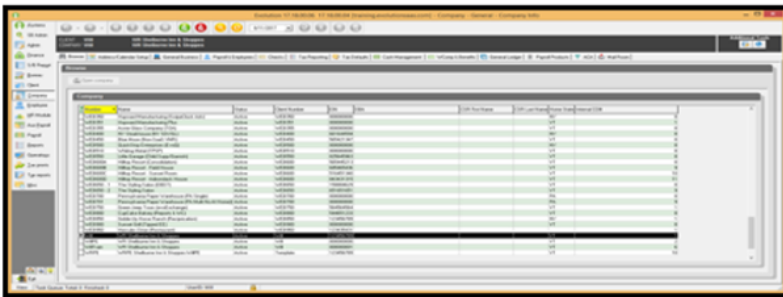
The Payroll Data Cutover Process

This section describes the process to perform a Payroll Data Cutover – which means – to onboard the company payroll data from Evolution Classic into Advanced HR 2.0.

You've completed all Evolution Classic and AHR 2.0 setup, now what?

The following fields in Evolution Classic will be migrated by the Payroll Data Cutover process:

- Company level information (company code, address, WC policy ID...) needs to be complete.
- (if used) DBDT structure.
- Employee, Dependent, and Emergency Contact information
- Pay rates/direct deposit information
- Employee education.



The company must exist in Evolution Classic and have a Status of “Access” in order to perform the payroll cutover. Verify that your Service Bureau has upgraded to the “Stowe” version of Evolution. We recommend that you have run a couple of payrolls with Evolution Classic before onboarding the company payroll cutover to Advanced HR 2.0.

Before the Payroll Cutover:

- Create a Service Account User
- Create the AHR 2 Security Groups
- Add the Evolution user email addresses
- Add the Employee email addresses
- Run the AHR 2.0 Onboarding Report

There is a Payroll Data Cutover wizard that will walk you through the process of onboarding a company from Evolution to Advanced HR 2.0.

Note: The Payroll Data Cutover Process will not complete if effective dates in Evolution Classic are for any future dates. You can use the AHR 2.0 **Onboarding Validation report (S3550)** to help you identify

any future effective dated fields and to correct them. Refer to the appendix in this guide “Effective Date Fields List and Onboarding Validation Report” for more information. These steps are also explained in the *AHR 2.0 Implementation Guide*, which can be found on the **Evolution Resource Center**.

The Data Migration Tool Overview

For those clients that are Advanced HR 1.0 users, note that there is the ability to migrate data from Advanced HR 1.0 into Advanced HR 2.0. This can be done as part of the Payroll Data Cutover process, or, anytime afterward from the **Company List** screen.

The **Data Migration Tool** feature enables the Admin user to migrate selected company and employee information from Advanced HR 1.0 for companies which were on it prior to the company Payroll Data Cutover into Advanced HR 2.0, or, for companies from this point forward which go through the **Payroll Data Cutover Process**, it is a new option as part of that process. The Migration can be triggered by the user at the end of the Payroll Data Cutover process where the system will prompt them if they want the additional data from Advanced HR Version 1.0 to migrate over to Advanced HR 2.0.

For companies which have already been through the Payroll Cutover process and onboarded onto Advanced HR 2.0, there is an option on the **Company List** screen (**HR Admin – Company – Company List**) which will enable that company’s data to be migrated to Advanced HR 2.0.

The Data that can be migrated into Advanced HR 2.0 currently includes the following:

- Dependent information
- Emergency Contacts
- Employee Notes
- Form W-4
- Employee Documents (Documents from the Employee Folder)
- Onboarding/Consent Documents (Documents from the Onboarding Profile)

It’s important to remember that the **Data Migration Tool** will only appear for those companies that are in Advanced HR 1.0. In addition, a necessary first step is to **turn off access** to the Advanced HR 1.0 company BEFORE the data migration occurs. Otherwise, there will be a discrepancy in the data that is flowing back to Evolution Classic. Unless this access to Advanced HR 1.0 has been turned off, the Data Migration Tool WILL NOT appear.

On the **Company Setup** screen, it is absolutely necessary that, prior to the Payroll Data Cutover, you switch off Access.

Click the **Access** option button located in the lower right portion of the screen. When clicked, the **Active Company** option button at the top of the screen will also switch off.

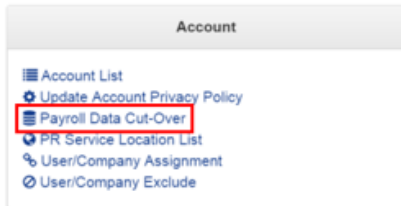
Remember to click the black **Save** button in the lower left corner.

Turning Off Access to the Company in Advanced HR 1.0

Note: For information about how to use the Data Migration Tool, refer to the section in this guide titled [“Using the Data Migration Tool”](#). Also note that the “Using the Data Migration Tool in Advanced HR 2.0 Job aid” is posted on the Evolution Resource Center, under the Advanced HR 2.0 – Job Aids section.

Performing the Payroll Data Cutover Process

To perform the Payroll Data Cutover:



You'll be taken to the **Data Cutover wizard**. This wizard will walk you through the simple process of onboarding a company from Evolution Classic to Advanced HR 2.0.

1. Go to **HR Admin – Account – Payroll Cut-Over**.

You can also access the Payroll Cutover within the **Quick Links** tab.


2. The system displays the **Payroll Data Cut-Over Process** screen.

 A screenshot of the 'Payroll Data Cut-Over Process' screen. The title bar says 'Payroll Data Cut-Over Process' with a menu icon. Below is a green header 'Data Cut-Over'. The main area is titled 'STEP 1 - Action Type and Connection'. It contains two dropdown menus: 'Action Type' with 'Please Choose (represents BLANK)' and 'Payroll Service Location' with 'Please Choose (represents BLANK)'. A blue button labeled 'Let's begin' with a right arrow is at the bottom.

3. In **Step 1, Action Type**, select an **Action Type** of **New – Import New Company**. This should be the only choice. Select it.

 A screenshot of the 'Payroll Data Cut-Over Process' screen, similar to the previous one but with selections made. The 'Action Type' dropdown now shows 'New - Import New Company' with a green checkmark. The 'Payroll Service Location' dropdown shows 'Evolution V3 - https://apidv.evolution-software.com/v3/api/burea...' with a green checkmark. The 'Let's begin' button remains at the bottom.


4. Select the **Payroll Service Location** (this is your Evolution Classic database, based on your specific environment). Per your implementation – there should only be one value to select displaying in this field. In our example, we select the **Evolution 3** environment. The Payroll Service Location points to your Evolution Classic database.

Payroll Data Cut-Over Process 


Data Cut-Over


STEP 1 - Action Type and Connection

Action Type


New - Import New Company 

Payroll Service Location

Evolution V3 - https://apidex.evolution-software.com/v3/api/burea... 

Let's begin 


5. Click the **Let's begin** button to start the Payroll Data Cutover process.
6. The system displays the **Step 2 – Company Selection** section.

Payroll Data Cut-Over Process 


Data Cut-Over

STEP 1 - Action Type and Connection

Action Type


New - Import New Company 

Payroll Service Location


Evolution V3 - https://apidex.evolution-software.com/v3/api/burea... 


STEP 2 - Company Selection


Company

Please Choose 


Default Time Zone

Please Choose (represents BLANK) 

Select company and continue 

I did something wrong... Let me start over 


7. Select the **Company** that you want to onboard from your Evolution database.
The Company list that is displayed in the dropdown will be all your clients in your Evolution Classic database.
8. Select the **Default Time Zone** for the company.

Payroll Data Cut-Over Process 


Data Cut-Over

STEP 1 - Action Type and Connection

Action Type


New - Import New Company 

Payroll Service Location


Evolution V3 - https://apidex.evolution-software.com/v3/api/burea... 


STEP 2 - Company Selection


Company

Alpha - Sample Client 

Default Time Zone

Eastern (US and Canada) (UTC-05:00) 

Select company and continue 

I did something wrong... Let me start over 

9. Click the **Select Company and Continue** button.
10. The system displays the **Step 3 – Options** section of the screen.

Step 3 allows the user to set default **Self Service** and **HR Admin Roles**. In addition, you can enable:

- **Swipe Clock** integration.
- **Admin Users** (who will not access Payroll Data)

When complete, click the blue **Set options and continue** button.

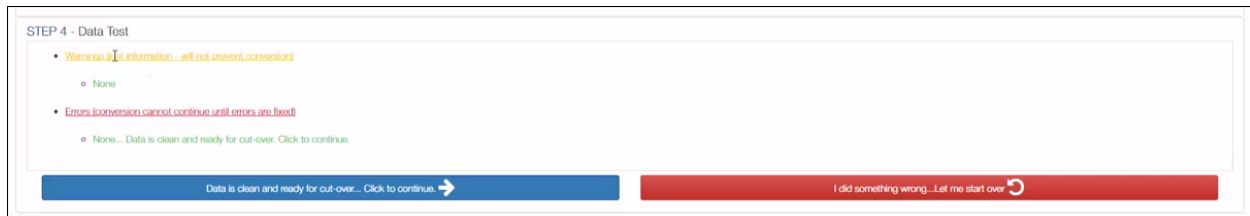
11. **Step 3** allows the user to set default Security Roles: Security Roles are discussed in detail in the *Advanced HR 2.0 Security Guide*.
 - a. Select the **Base User Role** from the **Self Service Role** dropdown.
 - b. Select the **Base Admin Role** from the **HR Admin Role** dropdown.

Note: Default Security Roles will automatically be created for the company after the Payroll Data Cutover is successful. After creation these roles can be assigned to users. Step 3 is merely for the purpose of creating a Base User and a Base Admin role. If these roles weren't added here, the company wouldn't have these roles to choose from after the Payroll Data Cutover. Security Roles are discussed in detail in the *Advanced HR 2.0 Security Guide*.

12. Once you select the appropriate options, click the blue **Set options and continue** button.

13. In the **Step 4 – Data Test** section, click the **Test Source Data** button.

- a. The purpose of Step 4 is to test the data BEFORE it is brought over into Advanced HR 2.0. For example, if there were duplicate email addresses, the system would flag them. The user could go back to Evolution Classic and correct the errors and **Test the source data** again.
- b. If the data is clean, however, the user will be allowed to proceed.

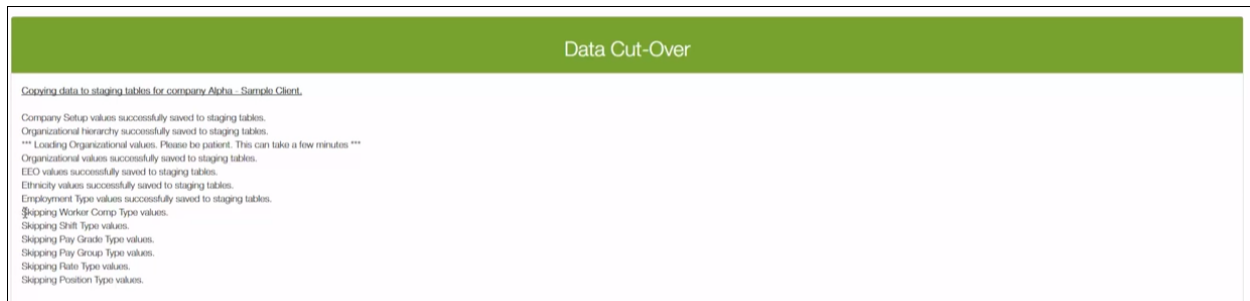


14. If there are no problems with the data, click the **Data is clean and ready for cut-over Click to continue** button. This will start the Payroll Data Cutover process.
15. The data starts moving from Evolution into the staging tables and then into Advanced HR 2.0, the progress is shown on the screen.



The Payroll Data Cutover is dependent on the size of the company being brought over. It could take 5 minutes or longer. It will bring employee data, direct deposit data, organization structure, DBDTs, etc.

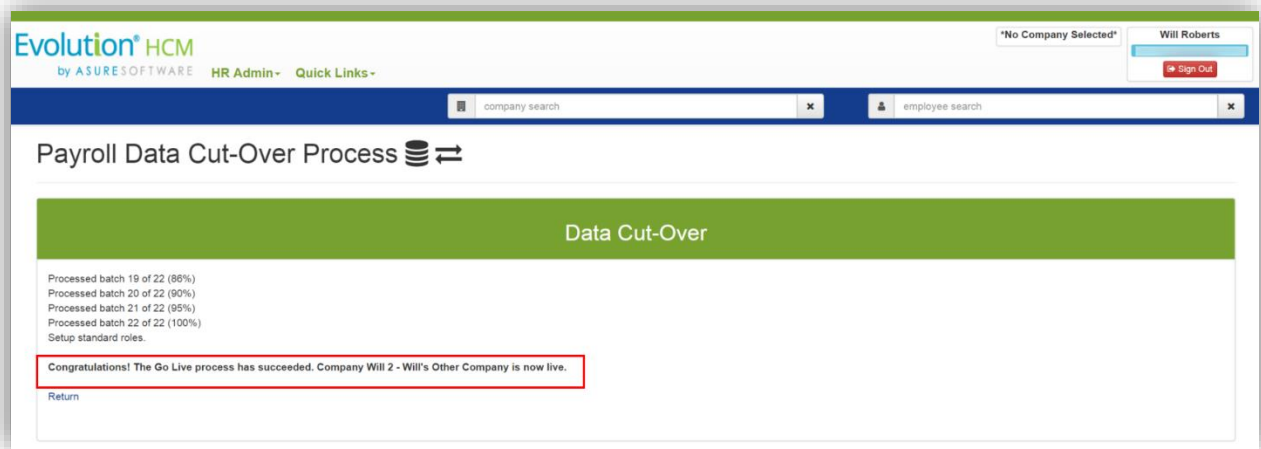
Note that the Best Practice is start small. Your first cutover should be with a company of no more that 1 to 2 dozen employees.



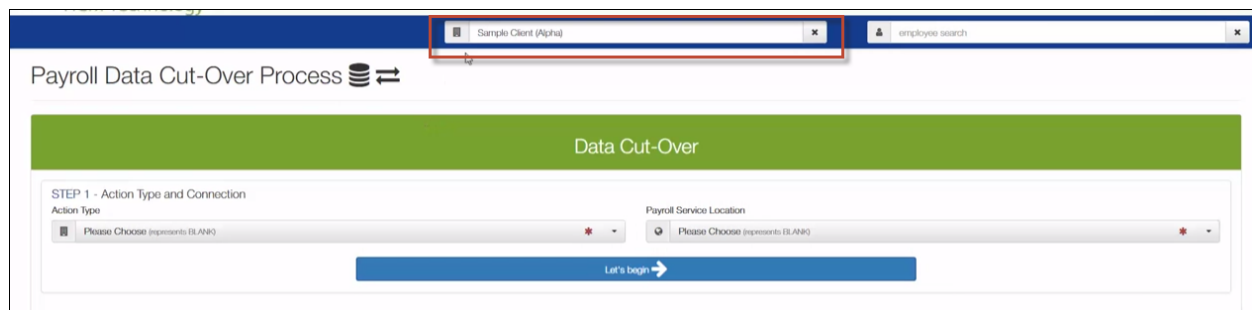
When done, the system displays a “Congratulations. The Go Live process has succeeded. Company NNNNN is now live” message.

Note: If you also want to migrate selected company and employee information for a company that was in Advanced HR v1.0 over to Advanced HR 2.0 immediately after performing the Payroll Data Cutover process, this is the point in the process which you would then use the **Data Migration Tool**. See the section in this Guide [Using the Data Migration Tool](#).

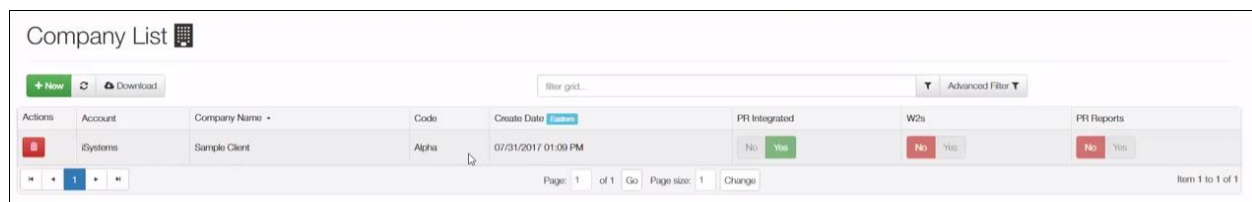
Note: Once the Payroll Data Cutover is complete, the company is now available for access in Advanced HR 2.0 and can be edited.



If you then go to the company search field at the top of the screen, you can now search for the company you just onboarded (Sample Client Alpha) in our example.



If you go to the **HR Admin – Company – Company List** screen, you will now see the company you just onboarded on the screen.



If you click on the company row, you get the details for this onboarded company.

Company: **Sample Client**

Company Info Account iSystems Company Name Sample Client Active No Yes Timezone Please Choose (represents BLANK) Create Date <small>Custom</small> 07/31/2017 01:00 PM Service Start Date 01/01/2001	Physical Name/Address Doing Business As Doing Business As Address Line 1 532 Sample St. Address Line 2 PO Box 19 City Sample State VT - VERMONT, US Zip Code 00999	Legal Name/Address Legal Name Legal Name Address Line 1 Address Line 1 Address Line 2 Address Line 2 City City State Please Choose (represents BLANK) Zip Code Zip
Contact First Name Contact Last Name Name Here	Other Info Worker Comp Policy ID Policy ID	

You can go to **HR Admin – Company Structure – Division / Branch / Department / Team** screens to see the company structure details.

Note that after the Payroll Cutover is complete, the best practice is to make sure of the following:

After the Payroll Cutover:

- Verify the Company was created
- Confirm the employee information is correct
- Update the future dated fields using the Onboarding Validation Report (S3550)

Remember: after the Payroll Data Cutover has been performed, the fields that have been migrated to Advanced HR 2.0 will be locked down in Evolution Classic.

The screenshot shows the 'Payroll Products' configuration window. The 'Payroll' section has 'Payroll Product' set to 'Evolution HCM' and 'HCM URL' set to 'https://Compass.Demoevolutionportal.Com/Hr/'. The 'HR' section has 'HR' set to 'Advanced HR 2.0'. The 'Employee Portal' section has 'Employee Access Option' set to 'Employee Portal' (highlighted with a red box). The 'Analytics' section has 'Include in Analytics' set to 'Yes' and 'Analytics Level' set to 'N/A'. The 'Swipe Clock Login' section is also visible.

When employees login, they will be directed to the **Company Dashboard**. This Dashboard will function as their Employee Portal.

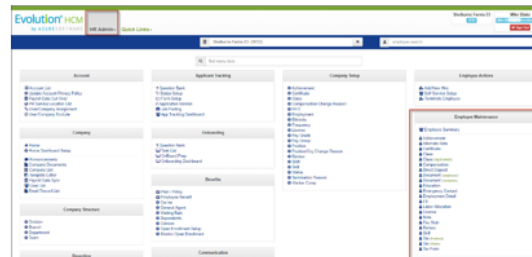
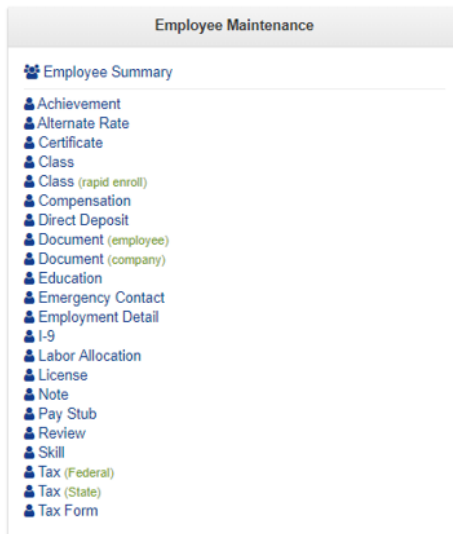
In addition, the **Employee Access Option** in the **Payroll Products** tab in Evolution Classic will automatically be switched from **Employee Self Serve** to **Employee Portal**.

Note that **Dependent** information is now coming over as part of the normal Payroll Data Cutover process. This will assist in keeping in sync with any already in progress ACA plans in Evolution for companies which are onboarding at mid-year to Advanced HR 2.0.

Employee Maintenance Menu

The **Employee Maintenance** sub-menu on the **HR Admin** page is the area where you work with *specific employee* records. Depending on your security settings, you may be able to add, edit, inactivate, and delete specific employee records.

An end user, such as an **HR Manager** or **Admin**, will most likely be accessing this tile on a regular basis.



Go to **HR Admin - Employee Maintenance** for access. Within the tile, you can:

- View the **Employee Summary**
- Set **Alternate Pay Rates**
- Enroll an employee in **Training Classes**
- View and edit **Direct Deposit** information
- Add employee and company **Documents**
- View and edit **Emergency Contact** information
- View an employee's **I-9**
- View and edit an employee's **Labor Allocation**
- Access **Pay Stubs**
- View and edit an employee's **Tax information**

Note:

Refer to the separate *Advanced HR 2.0 Employee Maintenance Guide* for information on how you update employee records using the **Employee Maintenance** menu screens and to learn how to Terminate Employees.

Important information for Administrators to know about two of these screens – **Direct Deposit** and **Employment Detail** – is also provided below in this Guide.

Direct Deposit

Base Users have the ability to add their Direct Deposits, whether for one bank account or multiple accounts. When an employee submits their Direct Deposit allocations for approval, their supervisor gets an email notification of the submission, including a link to follow so that they can approve or reject the Direct Deposit.

In addition, **Base Managers** and **Base Admins** have the ability to enter Direct Deposit information for employees. Please note that **Base Admins** can enter, view, and approve Direct Deposits for any employee in the company. **Base Managers** can only enter, view, and approve Direct Deposit information for the employees that they supervise.

Base Users

The **My Payroll – My Direct Deposit** screen displays a list of all current and past direct deposits. Clicking on an individual item row provides the details, as shown in the second screenshot.

Direct Deposits

+ New filter grid...

Actions	Start Date	End Date	Routing	Account	Account Type	Status
	03/01/2016	02/24/2017	000000000	65885	Checking	Approved

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Deposit: Simon Quinn, 569

Employee

Company: JCoz - Cozy Inn & Hamburgers (JCoz)

Employee: Quinn, Simon (18)

Bank Info

Routing Number: 000000000

Account #: 569

Account Type

Checking: No Yes

Savings: No Yes

Money Market: No Yes

Transaction Info

Start Date: 03/15/2017

End Date: 03/17/2017

Amount Code: Flat Amount

Amount: \$ 300.00

Details

Prenote?: No Yes

Deduction Info

Deduction Code: D02 - Partial Direct Deposit 1

Approval Status: Please Choose (represents BLANK)

To enter a new direct deposit request record, click the **+ New** button.

Save Changes

Save & Next Record

Close

Deposit: **NEW RECORD**

Employee

Company

Shelburne Farms 03 (SF03)

Employee

Braverman, John (9)

Bank Info

Routing Number

107000327

Account #

9561631686

Account Type

Checking

No

Yes

Savings

No

Yes

Money Market

No

Yes

Transaction Info

Start Date

01/03/2018

End Date

Amount Code

Percentage

Amount

% 100.00

Details

Enter the following information:

- Routing Number
- Account Number
- Start Date
- Amount Code
 - Percentage
 - Balance/Remainder
 - Flat Amount
 - Live Check Amount
- Amount of Deposit

Deduction Info

Note that an Admin or Manager, upon approval, will enter the **Deduction Info**. These are the E/D codes from Evolution Classic.

Click **Save Changes** when complete.

Note: Currently, the only **Account Types** that are set up for Direct Deposits are **Checking**, **Savings**, and **Money Market**. The system will allow for multiple entries in each category. Remember, if there are multiple checking accounts, for example, you'll need the corresponding E/D codes for each account.

Base Managers and Base Admins


Base Managers and **Base Admins** have the ability to enter Direct Deposit information for employees:

- **Base Admins** can enter, view, and approve Direct Deposits for *any* employee in the company.
- **Base Managers** can only enter, view, and approve Direct Deposit information for the employees that they supervise.

After receiving a notification that an employee has submitted a Direct Deposit request, the **Base Admin** user goes to the **HR Admin - Employee Maintenance - Direct Deposit**, to approve it.

Direct Deposits

[+ New](#) [Refresh](#) [Download](#) [Advanced Filter](#)

Actions	Name	Emp ID	Start Date	End Date	Routing	Account	Account Type	Status
	Mackay, Isaac	2	03/28/2017		000000000	89465435	Checking	Approved
	Ferrari, Harrison	106	04/12/2017		000000000	956514	Checking	Approved
	Blake, Anne	16	04/24/2017		000000000	984654	Checking	Approved
	Poole, Frank	123	04/25/2017		000000000	94622	Checking	Approved
	Mandrake, Lionel	108	05/16/2017		000000000	6656599855	Checking	Approved
	Blaker, Harriette	20	06/02/2017		000000000	500	Checking	Approved
	Arpuvian, Samson	134	01/03/2018		107000327	5165164685	Checking	Pending

Page: 3 of 3 Go Page size: 15 Change Item 31 to 43 of 43

The **Base Admin** sees a Direct Deposit dashboard for the company. They click on the name of the employee that has a Pending Direct Deposit request. In the **Deduction Info** section, they enter a **Deduction Code** for the Direct Deposit and change the **Approval Status** to **Approved**.

[Save Changes](#) [Save & Next Record](#) [Prev Record](#) [Next Record](#) [Close](#)

Deposit: 5165164685

Employee

Company
WR Shelburne Inn & Shoppes (WIL)

Employee
Arpuvian, Samson (134)

Bank Info

Routing Number
107000327

Account #
5165164685

Account Type

Checking
☒ Yes

Savings
☐ Yes

Money Market
☐ Yes

Transaction Info

Start Date
01/03/2018

End Date
End Date

Amount Code
Percentage

Amount
100.00

Details

Prenote?
☒ No

Deduction Info

Deduction Code
D01 - Net Pay Direct Deposit

Approval Status
Approved

Admins have the ability to edit any information. However, you'll need to enter a **Deduction Code** and change the **Status** to **Approved**.

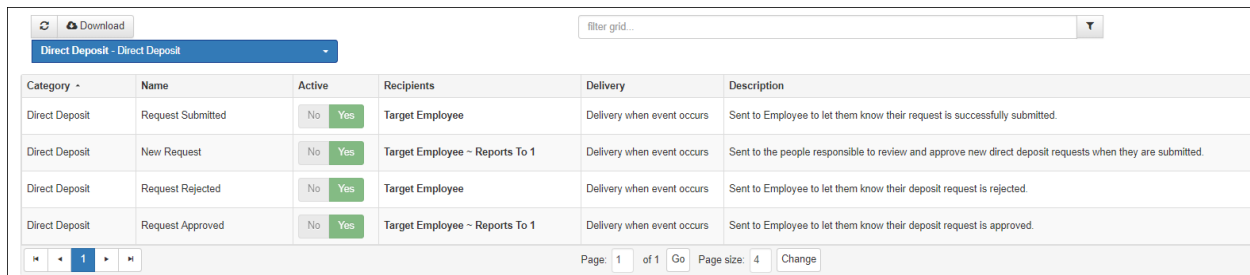
Once approved, the Direct Deposit will be active.

Direct Deposit Notifications

The following table lists the **Notifications** that **employees** and **Admins/Managers** may receive related to Direct Deposits.

Notification Name	Description
Request Submitted	Sent to 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 rejected.

Here are some sample Direct Deposit Notifications for a company from the **Communications – Notifications – Direct Deposit** category screen.



Category	Name	Active	Recipients	Delivery	Description
Direct Deposit	Request Submitted	No Yes	Target Employee	Delivery when event occurs	Sent to Employee to let them know their request is successfully submitted.
Direct Deposit	New Request	No Yes	Target Employee - Reports To 1	Delivery when event occurs	Sent to the people responsible to review and approve new direct deposit requests when they are submitted.
Direct Deposit	Request Rejected	No Yes	Target Employee	Delivery when event occurs	Sent to Employee to let them know their deposit request is rejected.
Direct Deposit	Request Approved	No Yes	Target Employee - Reports To 1	Delivery when event occurs	Sent to Employee to let them know their deposit request is approved.

For more information about the Notifications feature, refer to the [Notifications](#) section of this Guide.

Employment Detail

Provides complete details on the employee's Position/Status, Organization assignment, Compliance details, and Supervisor assignment(s), literally all the employee's employment details. From **Effective Dates**, to **DBDT** assignments, to **Benefits**, to who Supervises the employee. Most of this information will migrate from Evolution Classic to Advanced HR 2.0 when the Payroll Data Cutover is performed. Initially however, you will want to set up the **Reports To/Supervisor** section/field of the screen.

Multiple Entries for Employees May Display Depending on the Change

It's important to note on the **Employment Detail** dashboard - accessed by scrolling down the screen - a list of all the employee changes, and or, updates that have occurred will be displayed:

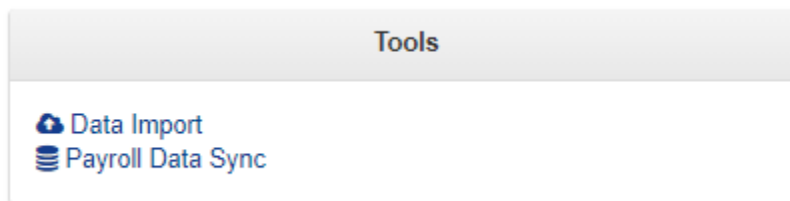
filter grid...									
Actions	Name	Emp ID	Eff Date	Position	Organization Structure <small>Division, Branch, Department, Team</small>	Status	Reports To 1	Hire	Term
	Shirt, Red	28	12/26/2017	NA	Main Office, Human Resources, HR Manager	Active		<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Smith, Jameson	27	11/13/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
	Smith, Jameson	27	10/11/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes

Note: Depending on the change, multiple entries for employees may be visible with the corresponding effective date (**Eff Date** column). This point has caused some confusion – this is not an indication that the system has created a duplicate record by mistake.

For more information about the Employment Detail screen, see the *Advanced HR 2.0 Employee Maintenance Guide*.

Tools Menu

The Tools menu provides access to the following items:



Data Import Tool

The Data Import tool allows you to import the following Employee related information into Advanced HR 2.0 by using the **Data Import Template** (Employee Concept) Microsoft Excel spreadsheet. You can download the Import Template from the Data Import Configure and Process Dashboard, enter the employee specific information, and then upload the template. Once uploaded, employee information will be imported into the appropriate fields into Advanced HR 2.0.

If the company has been previously been through the Payroll Data Cutover process, you can import the following information:

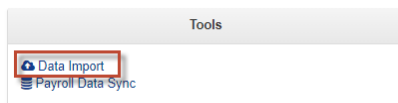
- Emergency Contact information
- Employee notes
- Achievements
- Certificates and license information
- Employee reviews
- Dependent information

- Class enrollment

Note: The Data Import 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 import tool needs 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.

To use the Data Import Tool:

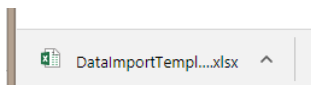
1. Go to **HR Admin – Tools – Data Import**.



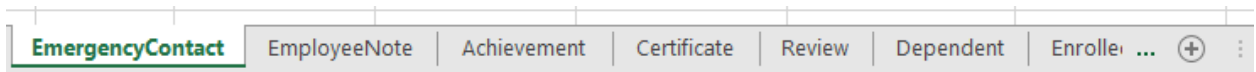
2. Select the **Company**.
3. Select the **Type of Data to Import** (for example, **Employee Concept Data**).

A screenshot of the 'Data Import' setup screen. At the top, there's a green header bar with the text 'Configure and Process Data Import'. Below this is a yellow box titled 'Setup Import'. Inside this box, there are two dropdown menus: 'Company' with 'Will's Other Company (Will 2)' selected, and 'Type of Data to Import' with 'Employee Concept Data' selected and a green checkmark. At the bottom of the yellow box are two buttons: 'Upload Spreadsheet' (blue) and 'Download Template' (orange).

4. Click on the **Download Template** button. Click on the **Data Import Template** file icon at the bottom left corner of your screen and save the Template file to your machine.



5. Open the saved Data Import Template file and enter the employee related information that you want to import on each tab of the spreadsheet. Currently, this consists of the following tabs.



Note: Required fields on each tab are shown by the column headings in **red**. Optional information is shown in black. Row 2 of the Data Import will be populated with sample information. It is important that before importing, you delete the non-relevant information, for example, the sample data in each row. If, for example, a user does not want to import Certificate or Review data, they can simply delete the tab, or, just delete row 2 of the template.

Emergency Contact tab

	A	B	C	D	E	F	G	H	I	J	K
1	EmployeeID	ContactType	FirstName	MiddleName	LastName	Address1	Address2	City	State	Zip	EmailAddress
2	6027	Brother	Joe	William	Hally	212 N HOLBROOK RD		SCOTTSDALE	AZ	85255	joe.hally@mydomain.com
3											
4											
5											

Employee Note tab

	A	B	C	D
1	EmployeeID	Date	Title	Description
2	6027	1/2/2018	Yelling	Yelling on personal phone call
3				
4				

Achievement tab

	A	B	C	D	E
1	EmployeeID	AchievementTypeCode	AwardedDate	ExpirationDate	Notes
2	6027	INT	1/2/2018	4/2/2018	Internship completed on 4/2/2018
3					
4					
5					

Certificate tab

	A	B	C	D	E	F	G
1	EmployeeID	CertificateTypeCode	CertificateNumber	IssuedBy	IssuedDate	ExpirationDate	Notes
2	6027	FIN	C123456	Head of Finance Dept	1/2/2018	1/2/2019	Completed with honors
3							
4							

Review tab

	A	B	C	D	E	F	G	H	I
	EmployeeID	ReviewTypeCode	ReviewStatusTypeCode	Reviewer1EmployeeID	Reviewer1ScheduledDate	Reviewer1CompletedDate	Reviewer1Rating	Reviewer2EmployeeID	Reviewer2ScheduledDate
	6042	ANNUAL	C	6027	1/1/2018	1/2/2018	85.50	6024	1/3/2018

Dependent tab

	A	B	C	D	E	F	G	H	I	J	K
	EmployeeID	RelationshipType	FirstName	MiddleName	LastName	BirthDate	SSN	GenderTypeCode	IsInsured	IsStudent	Address1
	6027	Child	Kim	Daisy	Harrison	1/2/2015	123-45-6789	F	True	False	212 N HOLBROOK RD

Enrolled tab

	A	B	C	D	E	F
	EmployeeID	ClassTitle	GradeOrResult	CompletionDate	ExpirationDate	Notes
	6027	Harassment Training	95	1/2/2018	1/2/2019	Completed with complete understanding

- Once you have completed entering the information in the desired tabs of the Data Import Template, **save** the Data Import Template file. **Note:** You do not have to complete all the tabs, only those for which you have data to import.
- To upload the employee information to Advanced HR 2.0, go to **HR Admin – Tools – Data Import**. On the **Data Import** screen, select the **Company** and **Type of Data to Import**.

Data Import

Configure and Process Data Import

Setup Import

Company
Will's Other Company (Will 2)

Type of Data to Import
Employee Concept Data

Upload Spreadsheet Download Template

8. Click the **Upload Spreadsheet** button.
9. Browse or Drag & Drop the Data Import Template file into the **Documents** field.

Upload Document (xlsx)

Documents

Browse or Drag/Drop documents

Drag & drop files here ...

Browse

Temporarily Uploaded Documents

Document has been successfully uploaded to our servers. Click the "Set Spreadsheet for Use" button below to lock-in this spreadsheet for processing.

Filename
DataImportTemplate_EmployeeConceptData.xlsx

Set Spreadsheet for Use

10. The system moves the Data Import Template to the **Temporarily Uploaded Documents** section of the screen. Click the **Set Spreadsheet for Use** button.
11. Back on the Configure and Process Data Import screen, in the **Process Import** section, click the **Click to Process Spreadsheet** button.

Data Import

Configure and Process Data Import

Setup Import

Company
Shelburne Inn & Shoppes - Will (Will)

Type of Data to Import
Employee Concept Data

Upload Spreadsheet Download Template

Process Import

Chosen Spreadsheet
DataImportTemplate_EmployeeConceptData_5.xlsx

CLICK to Process Spreadsheet

Import Type	Status	Message
-------------	--------	---------

After clicking the **Click to Process Spreadsheet** button, you'll be able to see the Status of each Import Type:

Setup Import

Company: 1701 Club (1701)

Type of Data to Import: Please Choose (represents BLANK)

Process Import

✓ Data successfully imported

Import Type	Status	Message
EmergencyContact	Success	Pre-check validation is clean
EmployeeNote	Success	Pre-check validation is clean
Achievement	Success	Pre-check validation is clean
Certificate	No Data	No data to import for this concept
Review	No Data	No data to import for this concept
Dependent	Success	Pre-check validation is clean
EnrolledClass	Success	Pre-check validation is clean

Note that in our example, we chose to not import any **Certificate** or **Review** data.

Once the Data Import is complete, and you get confirmation of the import, you can verify its success by viewing the information in the corresponding screen. For example, to verify the **Notes** import for an employee, go to **HR Admin - Employee Maintenance – Notes**.

Notes

+ New Download filter grid...

Actions	Date	Title	Description
	02/04/2018	Computer use	Using company computer for personal use on company time.

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Payroll Data Sync

The **Payroll Data Sync** menu item on the **Tools** menu is another link to the Payroll Data Cutover process.

Payroll Data Cut-Over Process

Data Cut-Over

STEP 1 - Action Type and Connection

Action Type: Please Choose (represents BLANK)

Payroll Service Location: Please Choose (represents BLANK)

Let's begin

Refer to the section in this guide titled **Payroll Data Cutover Process** to learn the details.

Using the Data Migration Tool

For those clients that are Advanced HR 1.0 users, note that there is the ability to migrate data from Advanced HR 1.0 into Advanced HR 2.0. This can be done as part of the Payroll Data Cutover process, or, anytime afterward from the **Company List** screen.

The **Data Migration Tool** feature enables the Admin user to migrate selected company and employee information from Advanced HR v 1.0 for companies which were on it prior to the company cutover into Advanced HR 2.0, or, for companies from this point forward which go through the **Payroll Data Cutover Process**, it will be a new option as part of that process. The Migration can be triggered by the user at the end of the process where the system will prompt them if they want the additional data from Advanced HR Version 1.0 to migrate over to Advanced HR 2.0.

For companies which have already been through the Payroll Cutover process and onboarded onto Advanced HR 2.0, there is a new option on the **Company List** screen (**HR Admin – Company – Company List**) which will enable that company's data to be migrated to Advanced HR 2.0.

The Data that can be migrated into Advanced HR 2.0 currently includes the following:

- Dependent information
- Emergency Contacts
- Employee Notes
- Form W-4
- Employee Documents (Documents from the Employee Folder)
- Onboarding/Consent Documents (Documents from the Onboarding Profile)

It's important to remember that the **Data Migration Tool** will only appear for those companies that are in Advanced HR 1.0. In addition, a necessary first step is to **turn off access** to the Advanced HR 1.0 company BEFORE the data migration occurs. Otherwise, there will be a discrepancy in the data that is flowing back to Evolution Classic. Unless this access to Advanced HR 1.0 has been turned off, the Data Migration Tool WILL NOT appear.

Data Migration Tool Steps:

1. Disable user access to AHR 1.0
2. Perform the Payroll Data Cutover process
3. Use the Data Migration Tool to move the data

See the steps below.

Step 1: Disable User Access to Advanced HR v1.0

First, do the following steps to disable employee access to Advanced HR v1.0 and The Port (Employee Portal) before running the Payroll Data Cutover process.

1. In Advanced HR v1.0, go to **Setup - Company Setup**, then select the **Company** you want to perform the Payroll Data Cutover Process and the Data Migration for.
2. On the **Company Setup** screen, de-select (uncheck) the **Access** check box at the bottom on the screen.

On the **Company Setup** screen, it is absolutely necessary that, prior to the Payroll Data Cutover, you switch off Access.

Click the **Access** option button located in the lower right portion of the screen. When clicked, the **Active Company** option button at the top of the screen will also switch off.

Remember to click the black **Save** button in the lower left corner.

Turning Off Access to the Company in Advanced HR 1.0

3. Click **Save** when done.

Once user access to the company in Advanced HR v1.0 has been disabled, the following conditions are true.

- All users – except for the Super Admin – will no longer be able to access the company's employee data.
- The Super Admin can still see the company in the Company list and can browse the data.

- The Super Admin will not be able to make any changes to the Company's employee data. If they attempt to make changes, the system will notify them that because access for the company is disabled, changes to the company's employee data cannot be made.

Note: If you have not gone to the **Company Setup** screen and unchecked the **Access** check box in Advanced HR v1.0, then you will not see that Company in the list of Companies available to migrate data from in Advanced HR 2.0.

You are then ready to start the Payroll Data Cutover process, and the subsequent Data Migration, if applicable.

Step 2: Perform the Payroll Data Cutover Process

Once you have disabled user access to the company in Advanced HR v1.0, you can now perform the Payroll Data Cutover process using Advanced HR 2.0. Refer to the *Advanced HR 2.0 Administrator Guide*, in the section titled [Payroll Data Cutover Process](#) to learn how to perform the Payroll Data Cutover process for a company. The *Advanced HR 2.0 Implementation Guide* also explains how to run the Payroll Data Cutover process.

Step 3: Use the Data Migration Tool at the End of the Payroll Data Cutover Process

After performing the Payroll Data Cutover process in Advanced HR 2.0 to onboard a company, in the final step, the system displays the message "Congratulations! The Go Live Process has succeeded. Company nnnnnn is now live."

Payroll Data Cut-Over Process

Data Cut-Over

Processed batch 19 of 24 (79%)
Processed batch 20 of 24 (83%)
Processed batch 21 of 24 (87%)
Processed batch 22 of 24 (91%)
Processed batch 23 of 24 (95%)
Processed batch 24 of 24 (100%)
Setup standard roles.


Congratulations! The Go Live process has succeeded. Company Irene - Irene is now live.

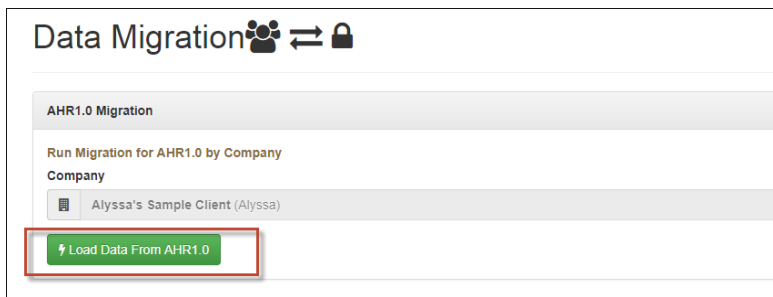
Return

Migrate Data From AHR 1.0


Remember, if the company is not already in Advanced HR 1.0, with access disabled, the user will not see the orange **Migrate Data** button.

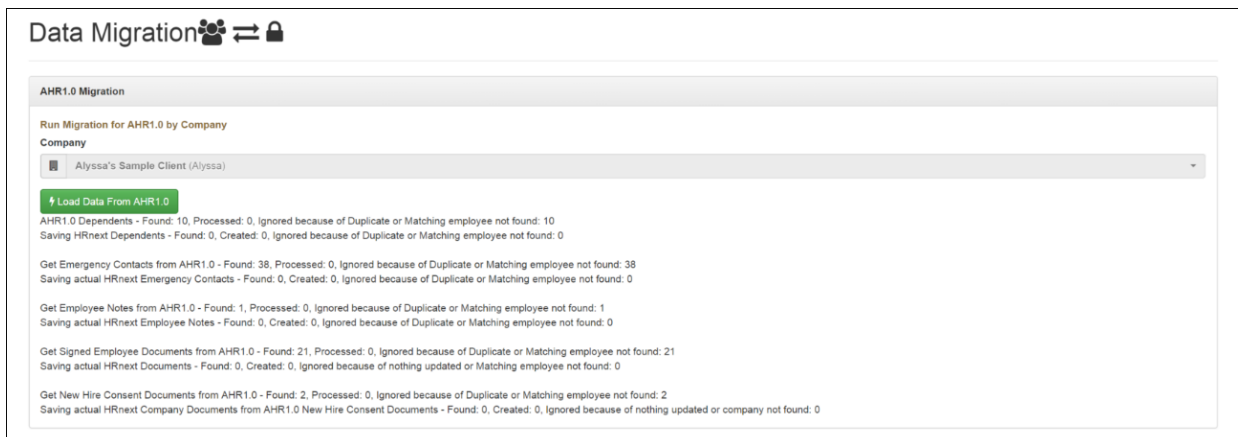
To begin the migration of data, click the orange **Migrate Data from AHR 1.0** button.

1. To now run the Data Migration Tool as an additional step of the Payroll Data Cutover process, click the **Migrate Data from AHR 1.0** button  at the bottom of the screen.
2. The system displays the **Data Migration** screen. You will be automatically locked into the newly cutover **Company**.



Note: If you have not gone to the **Company Setup** screen and unchecked the **Access** check box in Advanced HR v1.0, then you will not see that Company in the list of Companies available to migrate data from in Advanced HR 2.0.

3. To run the Data Migration Tool, click the green **Load Data from AHR 1.0** button .
4. The system displays a series of messages on the screen providing feedback on the Data Migration process. Depending on the size of the company and the amount of information coming over, this process could take several minutes.




- For example, for the employee Notes info category, if it found Notes information, how many records it found, and processed, and then created, as shown in the above screenshot.
- If the system did not find any information for an info category, for example – Dependents info, it displays “Ignored because of Duplicate or Matching employee not found, as shown in the above screenshot.
- For the above Data Migration status screen, you’ll see statuses of ALL data. It is normal to see “failures” in the status messages. For example, an emergency contact exists in both Advanced HR 1.0 and Evolution. Out of those two, one of the emergency contacts is the same one as the one in Evolution. The status message would then display:
“Get Emergency Contacts from 1.0 - Found: 2, Processed: 1, Ignored because of duplicate or matching employee: 1”

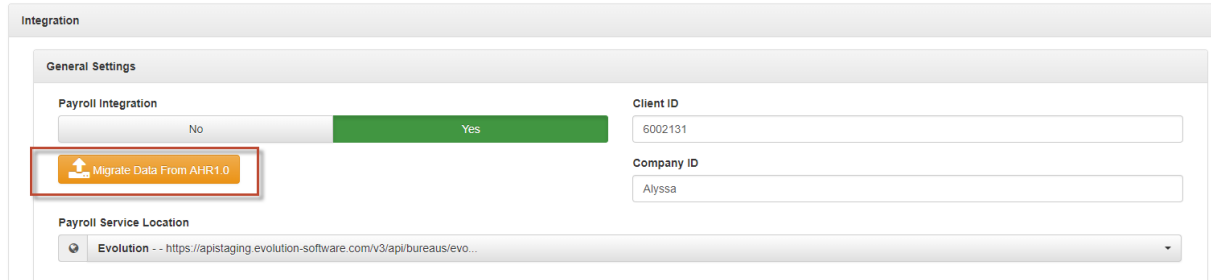
IMPORTANT! Once the Data Migration Tool process is completed, make sure that you verify that user access to Advanced HR 1.0 has indeed been disabled for users since, after the Migration, Advanced HR 2.0 is the system of record and no changes should be made to the company data in Advanced HR v1.0

What About Companies that Have Already Been Onboarded Using the Payroll Data Cutover Process?

If an Advanced HR v1.0 company has already been onboarded into Advanced HR 2.0 and has gone through the Payroll Data Cutover Process, you can still use the Data Migration Tool – but from a different location - by doing the following steps:


1. In Advanced HR 2.0, go to the **HR Admin – Company – Company List** screen. Select the **Company**.
2. Scroll down to the **Integration** section of the **Company List** screen, under **Payroll Integration**, click

the **Migrate Data From AHR 1.0** button .




The screenshot shows the 'Integration' section of the 'Company List' screen. Under the 'Payroll Integration' heading, there are two buttons: 'No' and 'Yes'. The 'Yes' button is highlighted in green. To the right of these buttons, there are input fields for 'Client ID' (containing '6002131') and 'Company ID' (containing 'Alyssa'). Below these, there is a 'Payroll Service Location' dropdown menu showing 'Evolution -- https://apistaging.evolution-software.com/v3/api/bureaus/evo...'. The 'Migrate Data From AHR 1.0' button, which has an upload icon, is highlighted with a red rectangular box.

3. The system displays the **Data Migration** screen.



The screenshot shows the 'Data Migration' screen. At the top, there is a header 'Data Migration' with icons for users, a double-headed arrow, and a lock. Below this, there is a section titled 'AHR1.0 Migration'. Inside this section, there is a button 'Run Migration for AHR1.0 by Company'. Below the button, there is a 'Company' dropdown menu showing 'Alyssa's Sample Client (Alyssa)'. At the bottom of the section, there is a green button 'Load Data From AHR1.0' with a lightning bolt icon, which is highlighted with a red rectangular box.

4. To run the Data Migration Tool, click the green **Load Data from AHR 1.0** button . The **Company** should already be selected.
5. The system displays a series of messages on the screen providing feedback about the Data Migration process. This process may take a few minutes.

Data Migration

AHR1.0 Migration

Run Migration for AHR1.0 by Company

Company

Alyssa's Sample Client (Alyssa)

Load Data From AHR1.0

AHR1.0 Dependents - Found: 10, Processed: 0, Ignored because of Duplicate or Matching employee not found: 10
 Saving HRnext Dependents - Found: 0, Created: 0, Ignored because of Duplicate or Matching employee not found: 0

Get Emergency Contacts from AHR1.0 - Found: 38, Processed: 0, Ignored because of Duplicate or Matching employee not found: 38
 Saving actual HRnext Emergency Contacts - Found: 0, Created: 0, Ignored because of Duplicate or Matching employee not found: 0

Get Employee Notes from AHR1.0 - Found: 1, Processed: 0, Ignored because of Duplicate or Matching employee not found: 1
 Saving actual HRnext Employee Notes - Found: 0, Created: 0, Ignored because of Duplicate or Matching employee not found: 0

Get Signed Employee Documents from AHR1.0 - Found: 21, Processed: 0, Ignored because of Duplicate or Matching employee not found: 21
 Saving actual HRnext Documents - Found: 0, Created: 0, Ignored because of nothing updated or Matching employee not found: 0

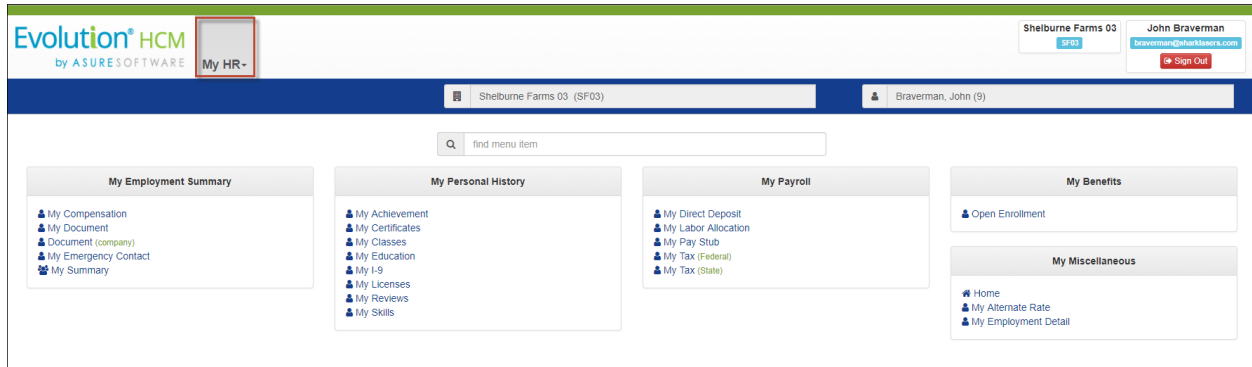
Get New Hire Consent Documents from AHR1.0 - Found: 2, Processed: 0, Ignored because of Duplicate or Matching employee not found: 2
 Saving actual HRnext Company Documents from AHR1.0 New Hire Consent Documents - Found: 0, Created: 0, Ignored because of nothing updated or company not found: 0

- For example, for the employee Notes info category, if it found Notes information, how many records it found, and processed, and then created, as shown in the highlighted area of the above screenshot.
- If the system does not find any information for an info category, for example – Dependents info, it displays “Ignored because of Duplicate or Matching employee not found, as shown in the above screenshot.
- For the above Data Migration status screen, you’ll see statuses of ALL data. It is normal to see “failures” in the status messages. For example, an emergency contact exists in both Advanced HR 1.0 and Evolution. Out of those two, one of the emergency contacts is the same one as the one in Evolution. The status message would then display:
- “Get Emergency Contacts from 1.0 - Found: 2, Processed: 1, Ignored because of duplicate or matching employee: 1”
- Note that the following Emergency Contact and Dependents Information does not migrate over from Advanced HR 1.0 to Advanced HR 2.0:

Emergency Contact Information:	
• Work Phone Ext.	• Work Email
Dependents Information:	
• Suffix	• Alias
• Salutation	• The Imputed Income, Disabled, Smoker, and Student check boxes
• PCP details such as Medical PCP ID & Name	• Dependent’s Medical Coverage

Advanced HR Employee Self Service Functionality

To see how the settings administrators make using the **HR Admin** menus/screens impact the employee users, refer to the separate document: *Advanced HR 2.0 Getting Started - Employee End User Guide*.



Employee My HR screen

Note:

Starting with the section in the guide titled “My Employment Summary”, the *Getting Started - Employee End User Guide* walks you through all the Advanced HR 2.0 screens from the employee's point of view. They are described in that guide rather than being duplicated here in this guide as well.

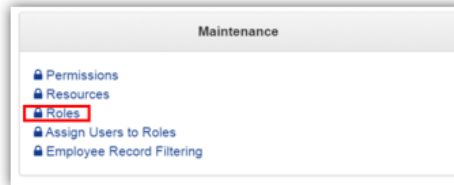
Security Menu

Base Security Roles will come over with the Cutover.

Initially, service bureau staff will be designated as **Super Admins** or **Service Bureau Admins**.

Go to **HR Admin - Security – Maintenance - Roles**.

- 4 Base Roles
- Roles are used for Client Users
- Do not edit Base Roles
- Clone to create custom Roles
- Base Roles added for Company upon Payroll Cutover

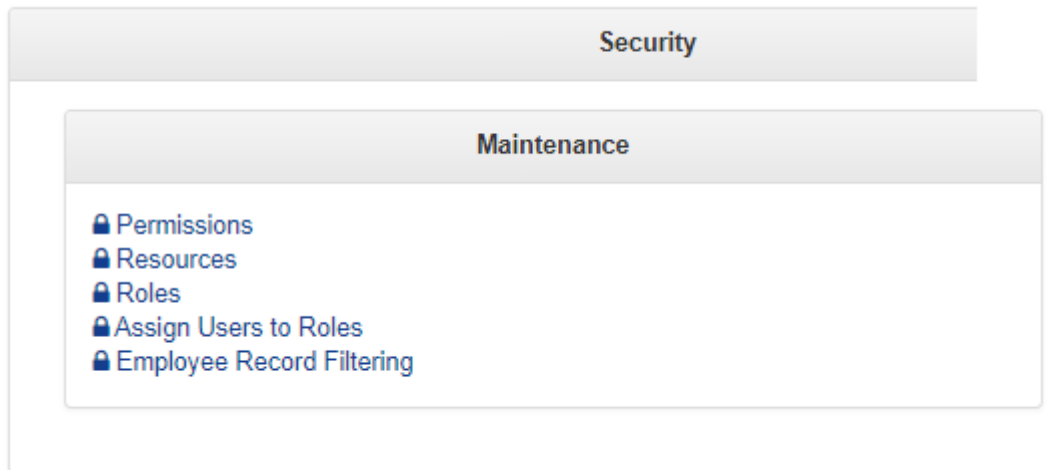


Security Role List

Download filter grid...

Actions	Name	Description	Role Level
	Will 2 - BaseAdmin	Admin Role	Admin
	Will 2 - BaseAnonymous	Anonymous User Role	Anonymous
	Will 2 - BaseManager	Manager Role	Manager
	Will 2 - BaseUser	Self Service User Role	All

Page: 1 of 1 Go Page size:



Note:

Security Roles and related topics are covered in a separate guide - the *Advanced HR 2.0 Security Guide*. Refer to that guide for more information about Security.

User Security Settings

Advanced HR 2.0 has very complex security setting capabilities that allow for unique access down to a field level.












During the initial conversion or subsequent onboarding process each employee is set up as a user with their unique username (email) and a **Security Permission** level of **ESS access**. Users requiring a higher level of access will need to have their Security Permission levels changed by the Service Bureau.

Security permissions can be set for field visibility and if the field is visible the permission levels can be set to allow for **Reading, Creating, Updating, and Deleting**. For example, we can create a User Role that can view but not update employee's salaries.

All security settings extend to reporting; therefore, a user who is not allowed to view salary information will not be able to generate a report with salary data.


For more information about security see the separate document: *Advanced HR 2.0 Security Guide*.



Tip: A common problem with being unable to log in is that the user clicks the original link provided in the Password Reset email. If the user does this they will get a screen with the Advanced HR logo and no login


User List 					
+ New  Download		jritter		 Advanced Filter 	
Actions	Username -	Active	Create Date 	First Name	Last Name
 	jritter9@msn.com	No 	08/17/2016 12:16 PM	Jim	Admin
 	jritter9@outlook.com	No 	07/29/2016 12:04 PM	Jim	Smith


Users will be temporarily locked out of Advanced HR for 30 minutes after three failed login attempts. If the employee is locked out, you will see a date and time in the **“Locked Out Until Date”** field. Unlocking an employee is accomplished by clicking on the summary line to display the dialog box, deleting the lockout time, and saving the change as demonstrated in the second screenshot below.


User Info


Username 

 Username (email) 


Password 




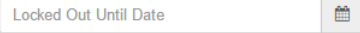

Create Date 

05/04/2017 01:36 PM 

Active

No 

Locked Out Until Date 

Appendix 1: Future Dated Fields List and Onboarding Validation Report (\$3550)

There are several fields in Evolution that can be **Future Effective Dated**. The Payroll Data Cutover process will not bring over ANY future effective date information from Evolution Classic that is AFTER the actual payroll cutover date. Because of this, it is necessary to find the items that have a future effective date in Evolution Classic, and remove the future information *prior to the cutover*.

Once that information is removed, and the Company has been brought over to Advanced HR, The information can be re-entered into the Advanced HR 2.0 system with the correct future effective date. Since, after the cutover, Advanced HR 2.0 will become the system of record, this is a necessary step.

For this purpose, we have developed a Company Level report – **AHR 2.0 Onboarding Validation Report (\$3550)**, that when run, will display the fields listed for each employee that has a future effective date.

The **\$3550 report** will highlight:

- Name (first, middle initial, last)
- Social Security Number
- Current status code
- Salary amount
- Rate number
- Rate amount
- DBDT fields
- Default Workers Comp

#Jennifer JS Shelburne Inn & Shoppes		
AHR 2.0 Onboarding Validation (\$3550)		
Onboarding Date: 11/1/2017		
Employee Number: 1	Name: Megan Forsyth	SSN: xxx-xx-1111
Effective Date	Field	Field Value
1/1/2018	Last Name	Hebert
1/1/2018	Middle Initial	
Employee Number: 2	Name: Isaac Mackay	SSN: xxx-xx-1089
Effective Date	Field	Field Value
12/1/2017	Branch	Reception
12/1/2017	Department	Desk
12/1/2017	Division	Main Office
Employee Number: 5	Name: Virginia Parsons	SSN: xxx-xx-3212
Effective Date	Field	Field Value
11/15/2017	Default WC	Wheat/Hay Baling

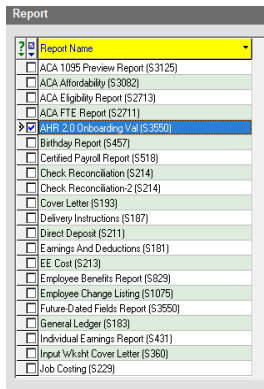
Note: The **Name** fields and **Social Security Number** fields cannot be future dated in Advanced HR 2.0.

This company level report provides a parameter for the entry of the targeted (expected) onboarding date, and identifies future effective-dated values in Evolution Classic.

The report has an Input parameter requirement: Date. This should be the expected date of onboarding the company, so that the Administrator can identify at what point to begin looking for future dated values.

To run the Onboarding Validation Report:

1. Go to **Reports-Run Reports**.
2. Select the company you are planning to onboard.
3. Select the **Onboarding Validation Report (\$3550)**.



4. Select the **Import Parameters**. Select parameters such as masking sensitive data, sorting by last name, or output to .csv or Excel

Input Parameters

- **Start Date**
 - Enter the expected date of Payroll Cutover
- **Sort**
 - Select your preferred sort methods
- **Fields**
 - Leave blank for All fields, or select specific fields to search
- **Mask Sensitive Information**
 - Mask SSN and other sensitive Information as desired
- **Additional Output**
 - Select CSV or Excel for these output methods
- **Employee Filter**
 - Select specific employees if desired.

1. Go to **Reports-Run Reports**.
2. Select the **company** you are planning to perform the cutover on.
3. Select the **AHR 2.0 Onboarding Validation Report (S3550)**.
4. Select **Import Parameters**.
5. Click **Run Report**.

5. Click **Run Reports**.
6. Save the Report for future action.

Update any Effective Dated Fields in Advanced HR 2.0

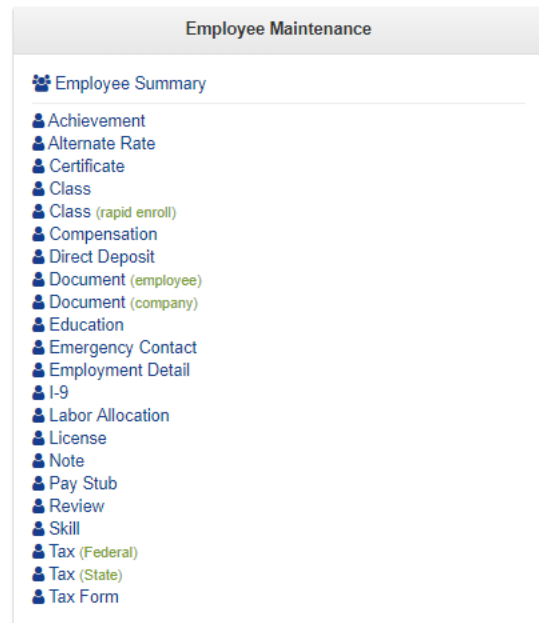
Once the future dated fields are identified, it will be necessary to manually change them to the current date (the **Payroll Data Cutover** date) in Evolution Classic.

It is highly recommended that you keep this report. After the Payroll Data Cutover, it will be the only record of future changes to the employee's information.

Note: The AHR 2.0 Onboarding Validation Report (S3550) is a **Company Level Report** that must be pulled from the **SB Reports** and then added to each company that will be cutover. In Evolution Classic, go to **Bureau-Company Default Reports** to find this report.

Now that the report has been generated, find the Employee in Evolution Classic, and manually remove the future dated lines from the **Effective Date Editor**.

The fields that need to be updated will, for the most part, be located in the **Employee Maintenance** tiles in the **HR Admin** menu tab, shown at right.



Once the future details have been removed, the company is now ready to onboard. In Advanced HR 2.0, go to **HR Admin – Account - Payroll Data Cutover** to perform the cutover.

Payroll Data Cut-Over Process

Data Cut-Over

STEP 1 - Action Type and Connection

Action Type

New - Import New Company

Payroll Service Location

Evolution V3 - https://apidev.evolution-software.com/v3/api/burea...

Let's begin

After the cutover is successful, find the fields that were shown to be future dated (according to the S3550 Report), and update them accordingly in Advanced HR 2.0.