Evolution® HCM
by ASURESOFTWARE

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 *Advanced HR 2.0 Employee Maintenance Guide*.
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 *New Employee Onboarding Guide* 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

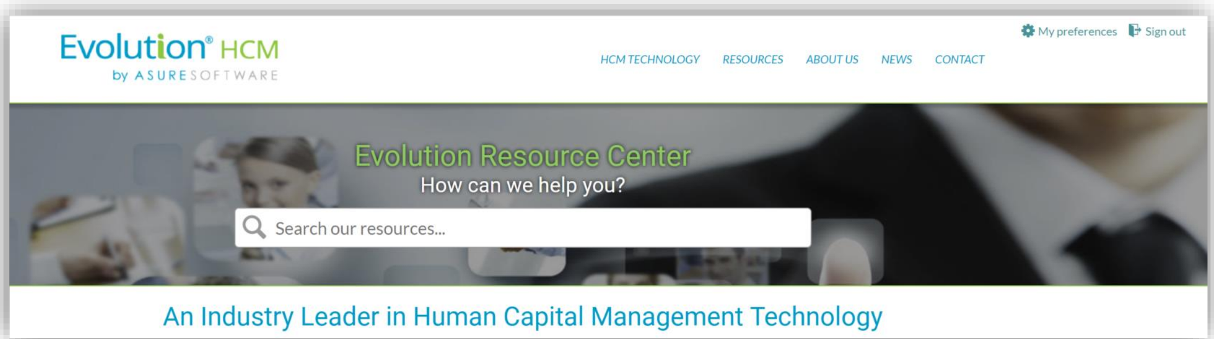
Employee end users should refer to the separate document *Getting Started: Employee End User Guide* which describes Advanced HR 2.0 from the employee user point of view.

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

Advanced HR 2.0 Administrator Guide

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:

Admin Guide Topics:

- 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

A New Vocabulary

As with any new product, Advanced HR 2.0 introduces some new terms that you should become familiar with.

Term	Description
Alternate Rate	This menu option displays employee's additional rates when the employee has multiple rates.
Anonymous Role	The first default security level in Advanced HR 2.0 (Anonymous) is for someone who is unknown to the system – who has no security level access set. This could be an applicant who is filling out an onboarding application or someone who isn't assigned a role in general. Users that are not 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. Permissions are assigned to the anonymous user role to suppress visibility or make fields required by applicants or onboarding candidates.

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	In Advanced HR 2.0, every clickable item in the system is known as a Resource. The default security roles allow different levels of access to these resources. To change a security role to restrict or to allow access to a Resource, the service bureau will need to set the Permission on the Resource itself. Resources are what the user is giving (security) Permissions to (see Permissions above).
Self-Service Setup	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.

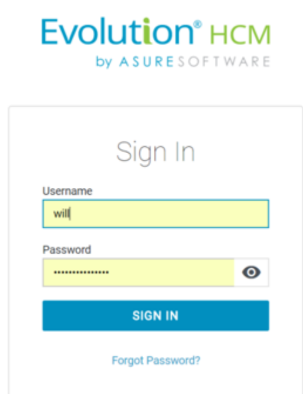
Getting Started

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.



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.

Usernames

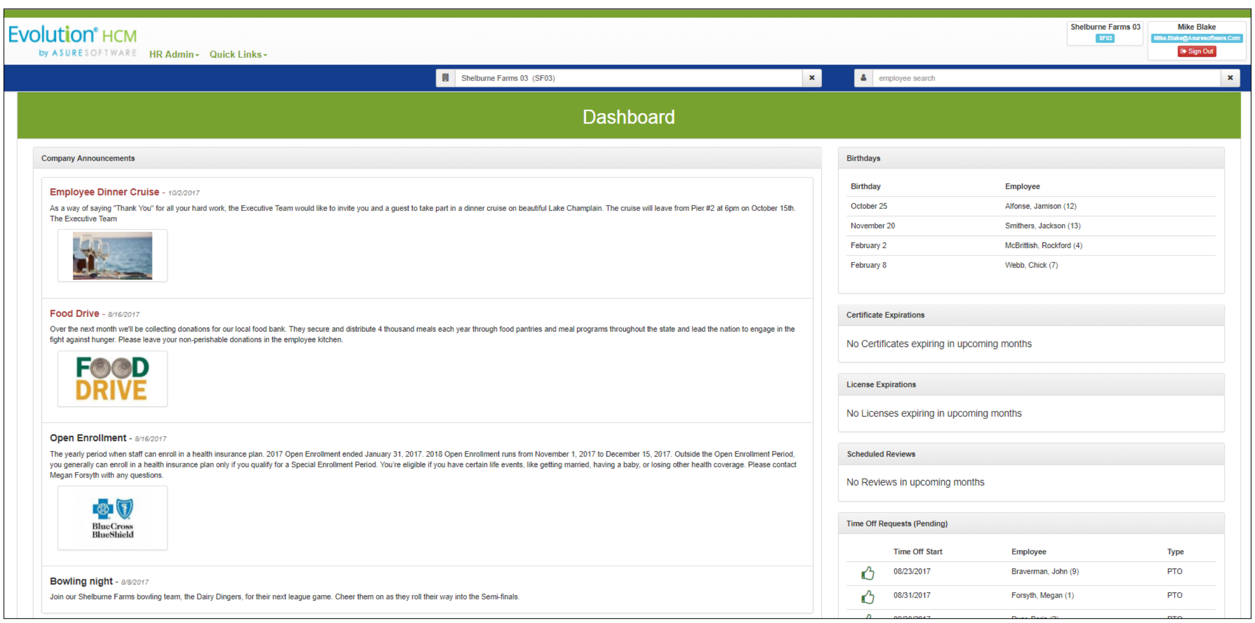
In order to use Advanced HR 2.0, all employees must have an email address which serves as the **username**. This ensures that all users have a unique username and can receive email communication through Advanced HR 2.0.

Passwords

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

The Dashboard

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.



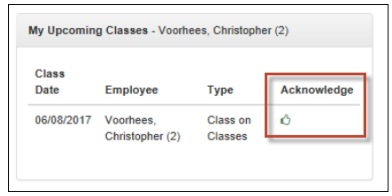
Advanced HR 2.0 Dashboard Sample

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**:

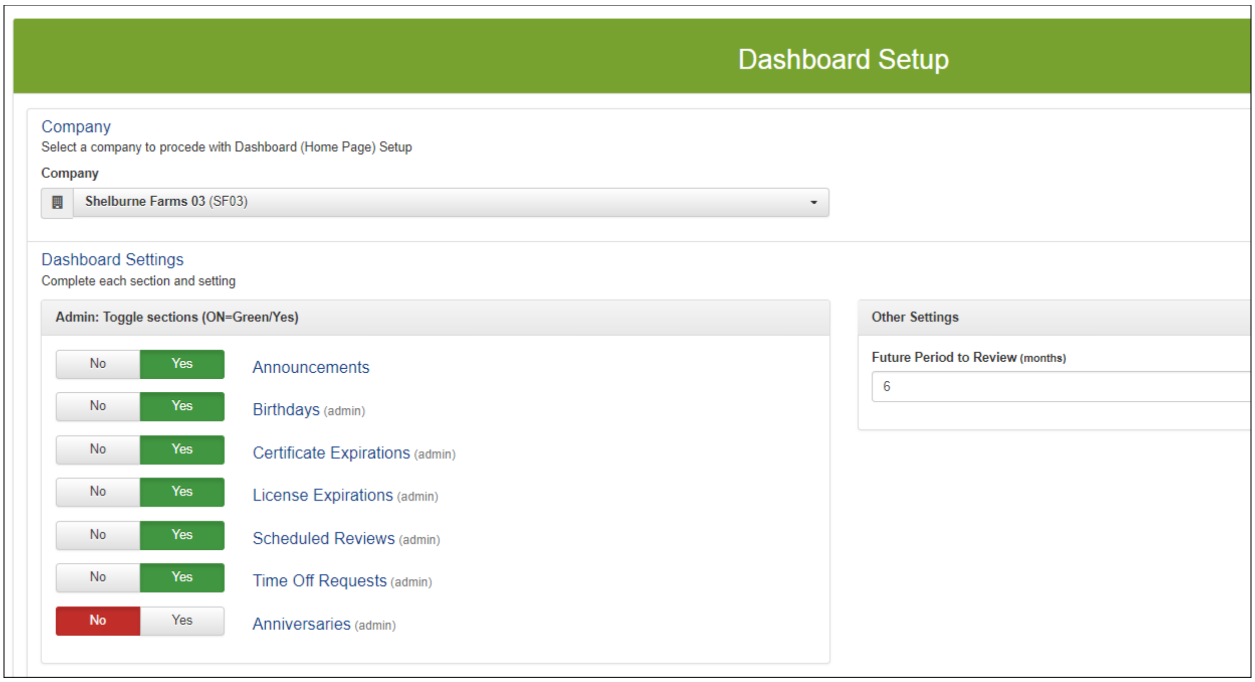
- Employee reviews
- Classes
- Expirations

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.

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



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.

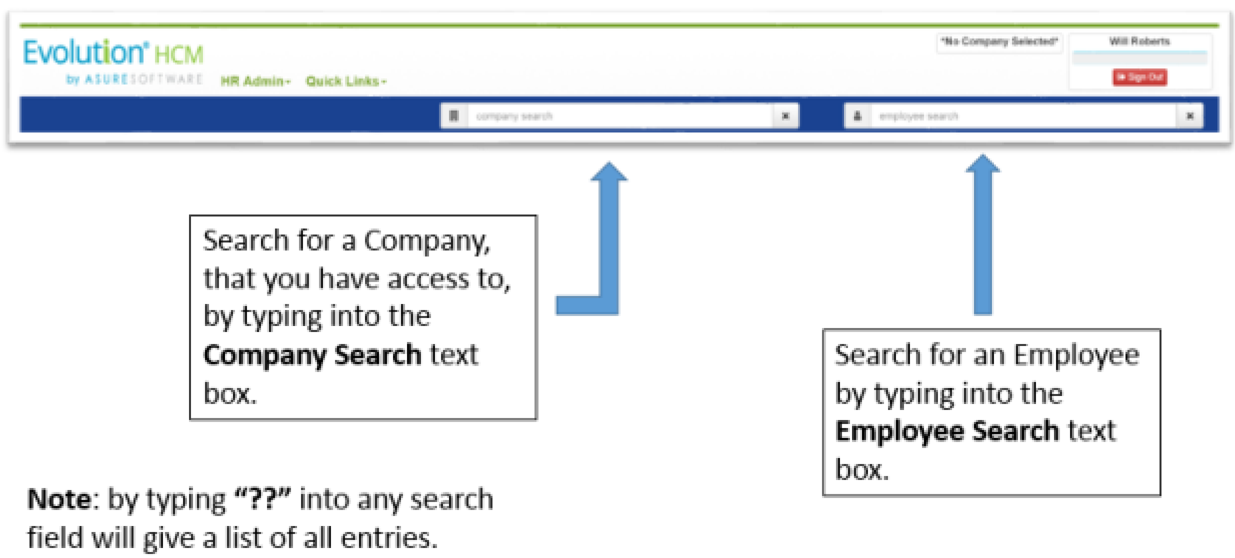
Note: System Administrators configure how the Dashboard appears to users on the **HR Admin – Company – Home Dashboard Setup** screen. Refer to the Home Dashboard Setup section of this document.

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.



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

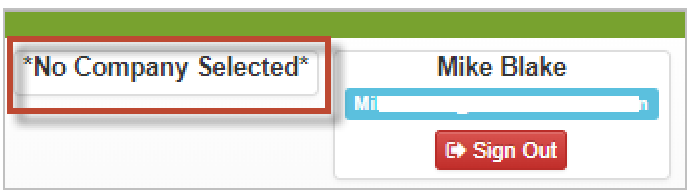
Note: The Employee Search will not search on a first AND last name; only the first name or the last name or the employee number.

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.”

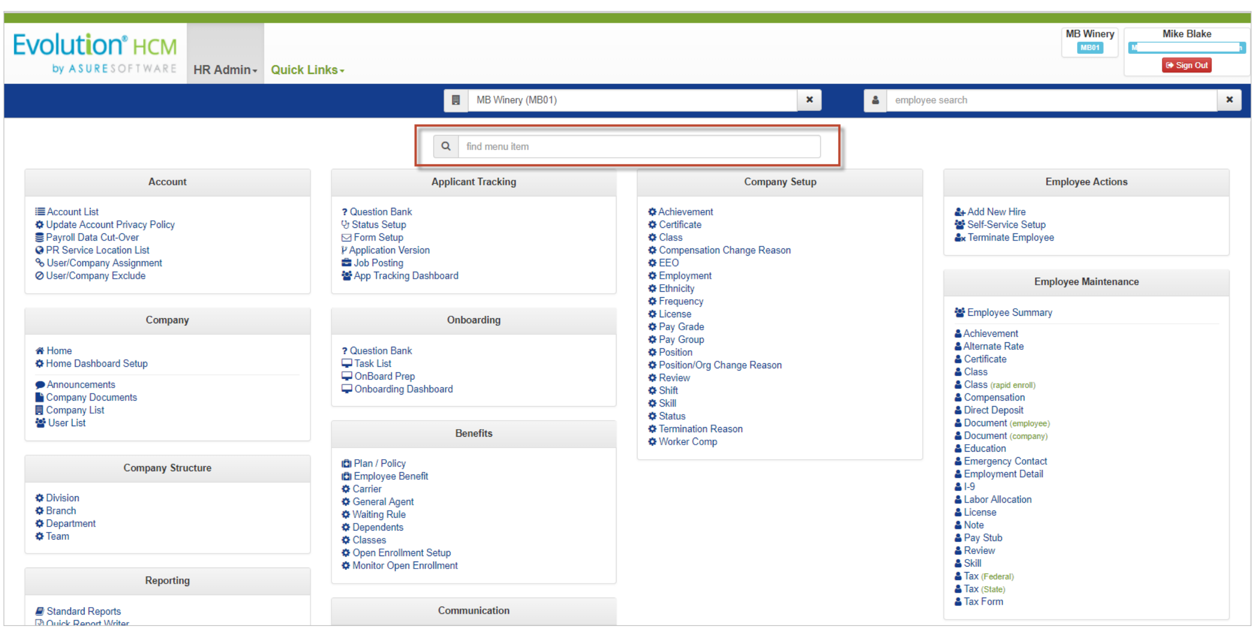
You can “unlock” a company or an employee by clicking the “**x**” on the right side of the company/employee search field.

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

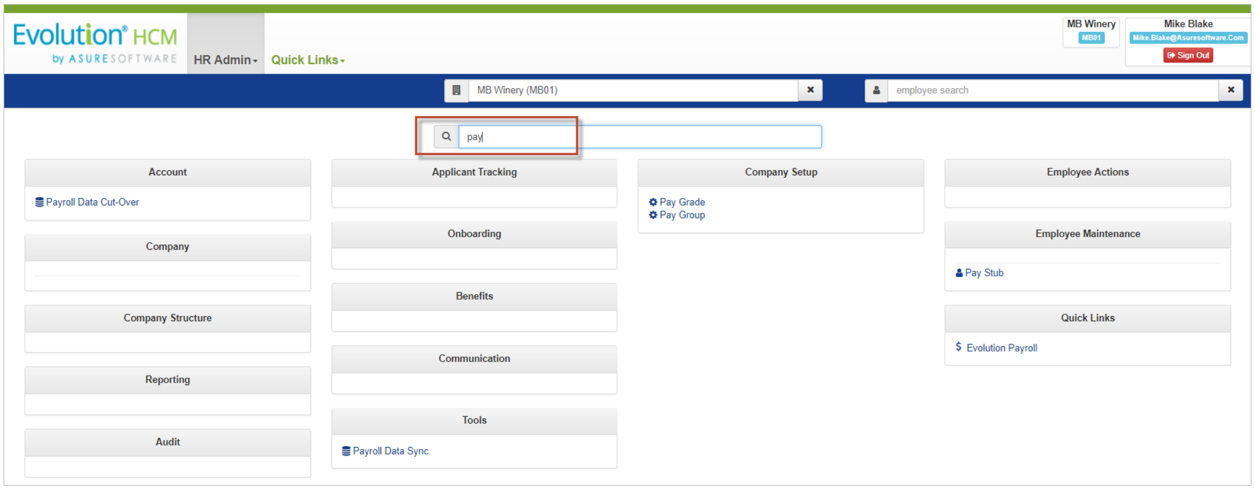


Find Menu Item Filter

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.

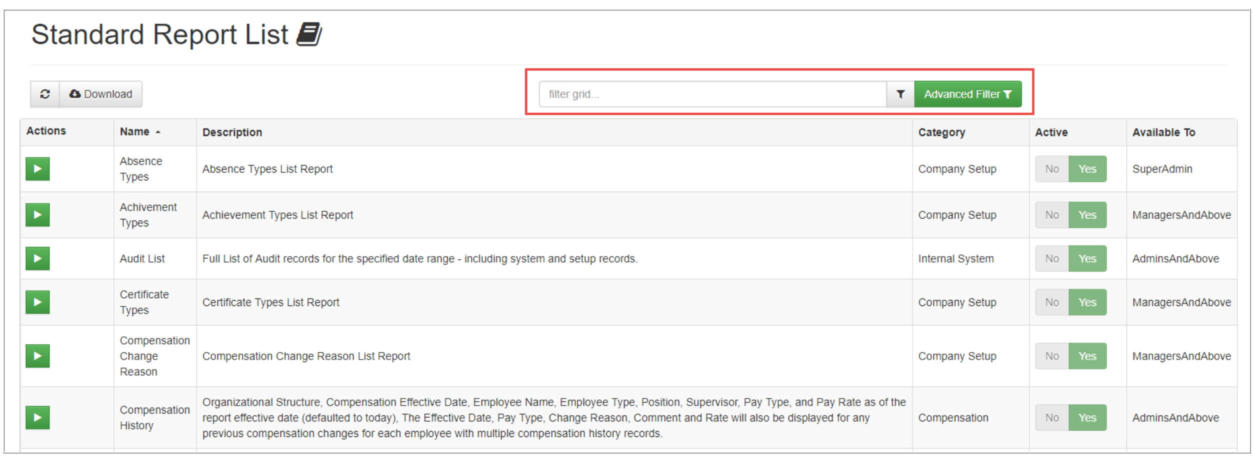


In the example below, we start to type the word “pay”. Advanced HR 2.0 then displays only the menu items that have “pay” in the title.



Filter Grid

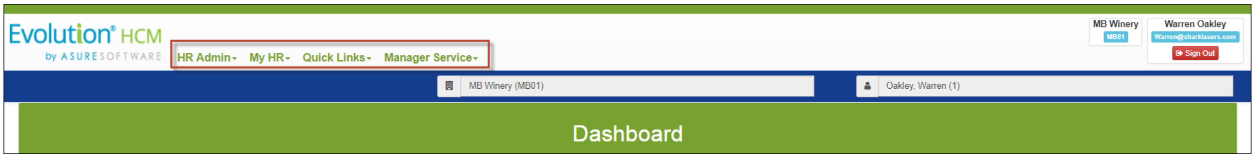
Every dashboard has a **Filter Grid**. Simply type a word or a partial name into the grid and press **Enter**. Advanced HR 2.0 will display all relevant entries.



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

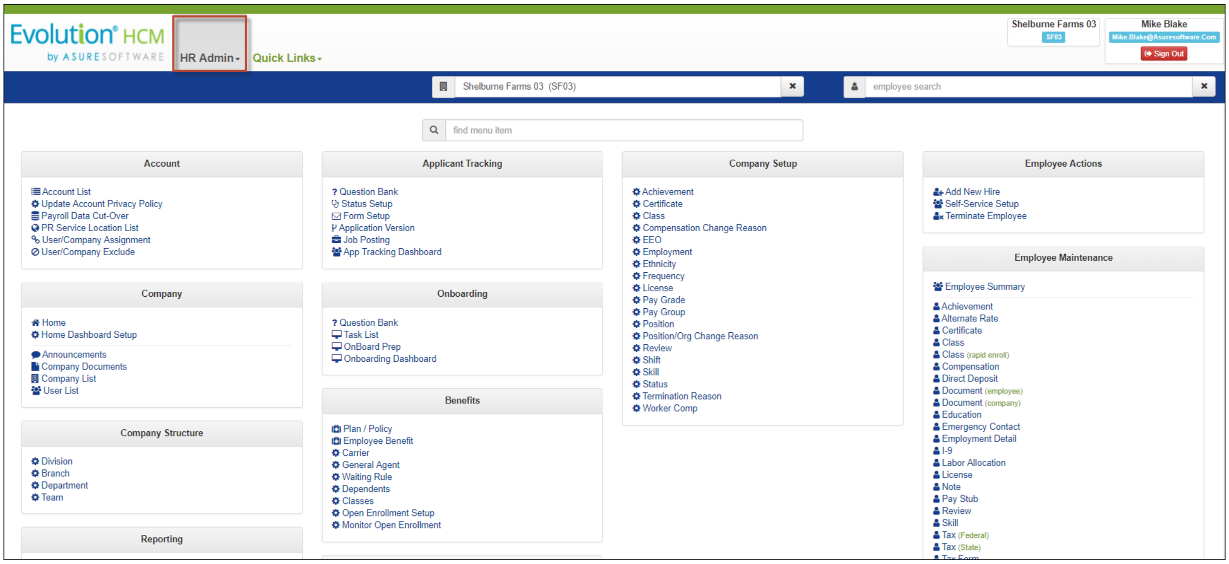
Located just above the **Dashboard**, there are links to different modules or segments of Advanced HR 2.0. The specific links that display vary by the user’s assigned level of security role access which is set by the system administrator.



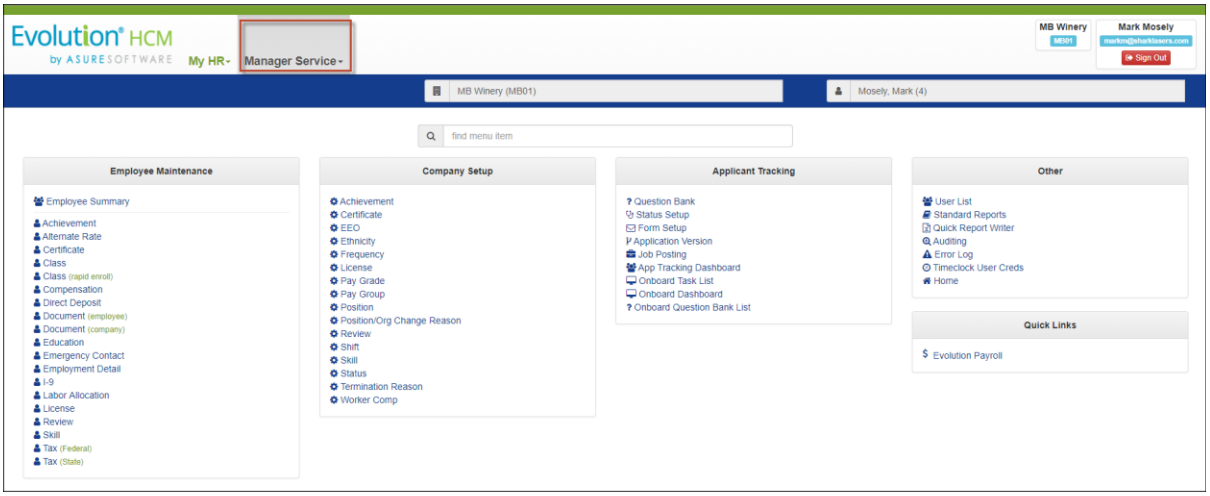
The above screenshot and the following table describes ALL of the potential **Dashboard** screen module links that may be present, depending on the user's role. The specific user's **Dashboard** links will probably have only one or two of these tabs.

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**.

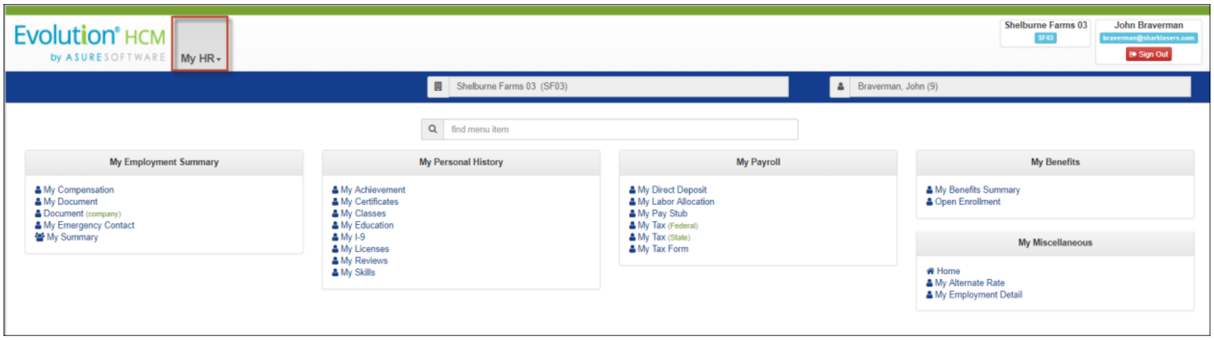
After clicking on one of the module links such as **HR Admin**, you will be presented with a sub-menu of available options. A sample **HR Admin** module sub-menu, a sample **Manager Service** sub-menu, and a sample **My HR** menu are shown in the following examples. Note the different options on each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



HR Admin Menu Screen



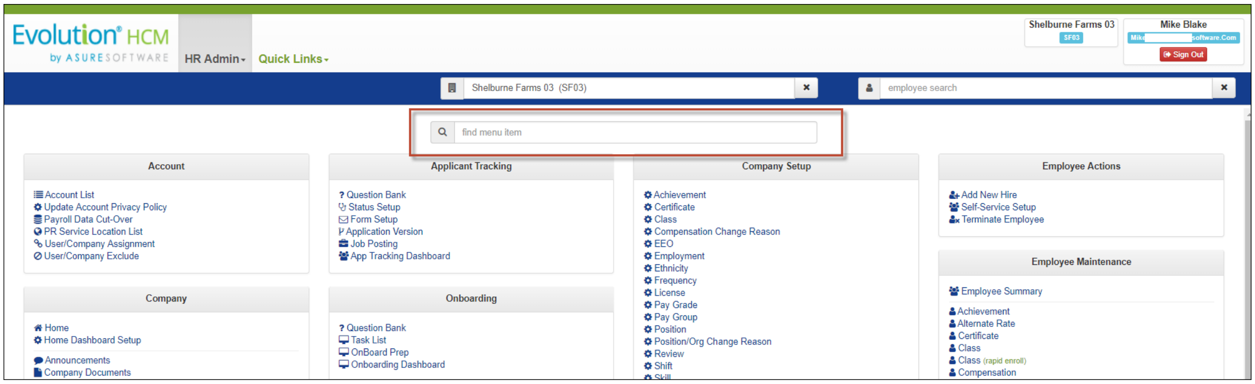
Manager Service Menu Screen



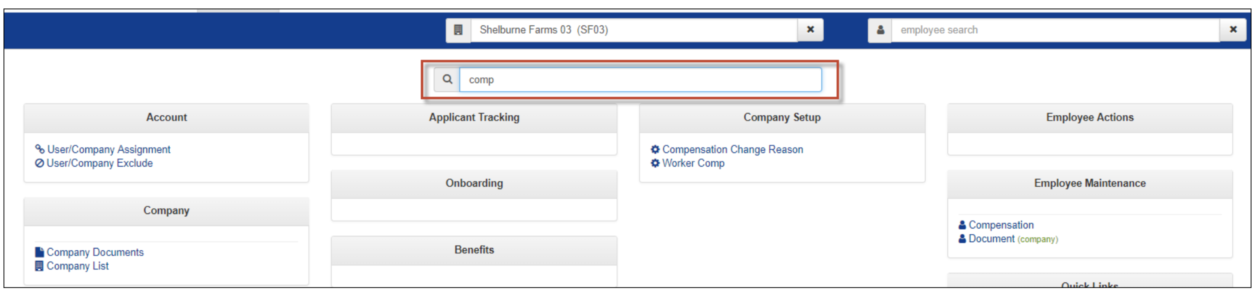
My HR Menu screen for a Base User employee

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.



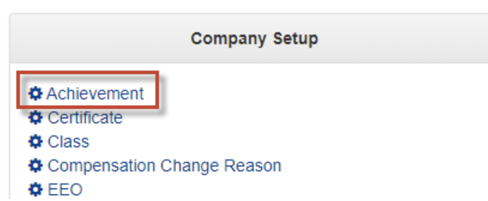
In the following example, if you stop typing the word "compensation" at "comp" Advanced HR will filter the menu and present only those options that have that specific string of characters. If you continue typing, the only options that display are shown below.



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

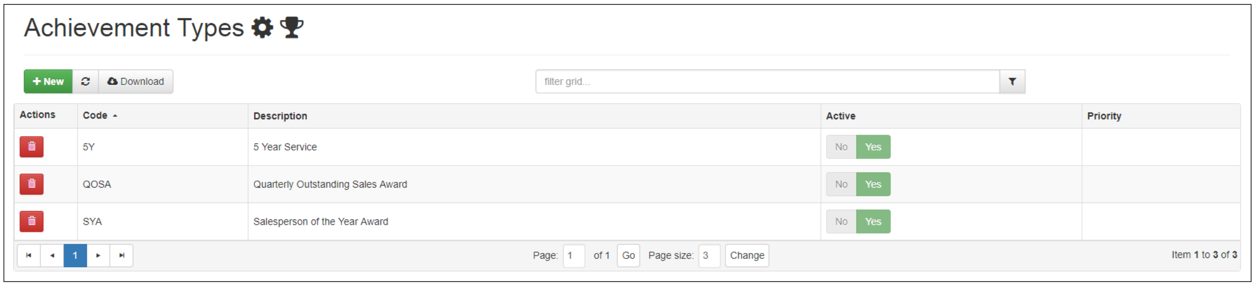
Summary and Detail Screens

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.



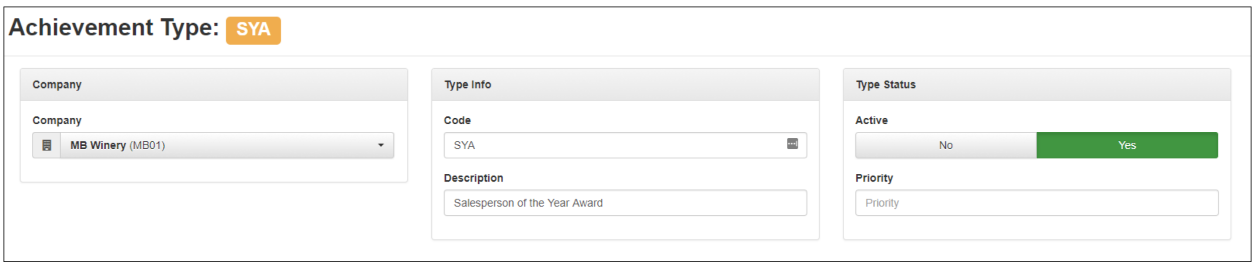
Summary Screen

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



Detail Screen

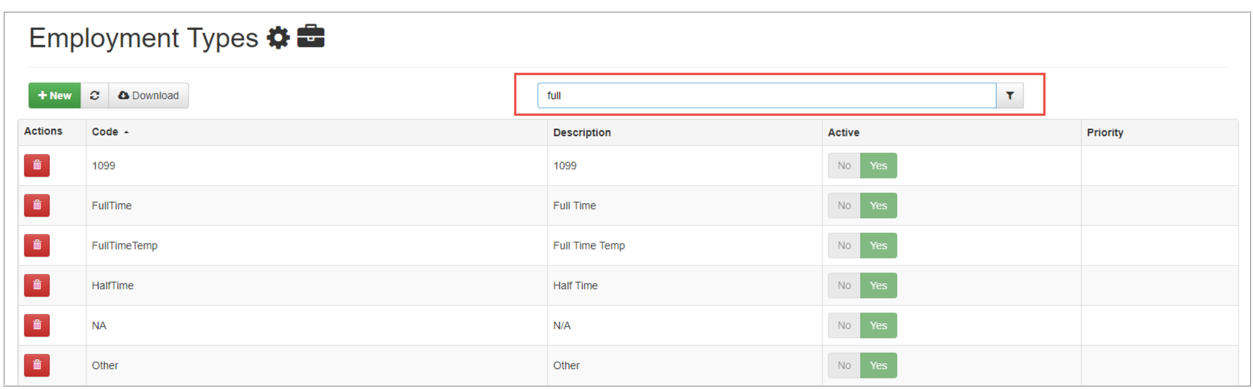
To see more detail, simply click on the specific line item (row) you are interested in and the system displays the details screen for that item. For example, the following screenshot shows the details of the Salesperson of the Year Achievement Type.



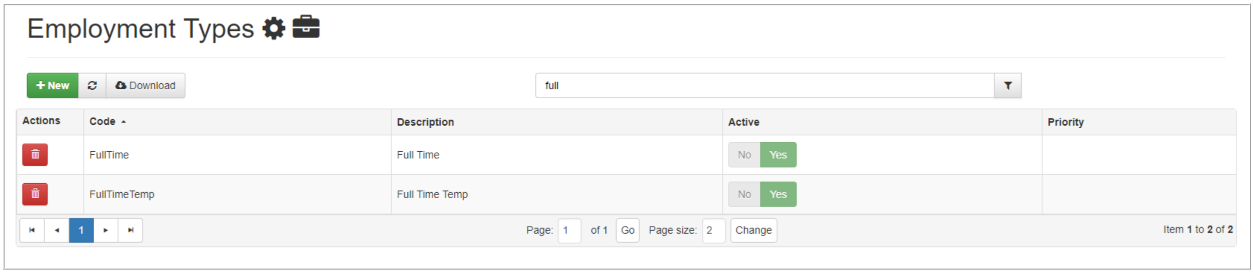
The **Prev Record** and **Next Record** buttons (shown at right) allow you to quickly scroll through all available employee records.

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.



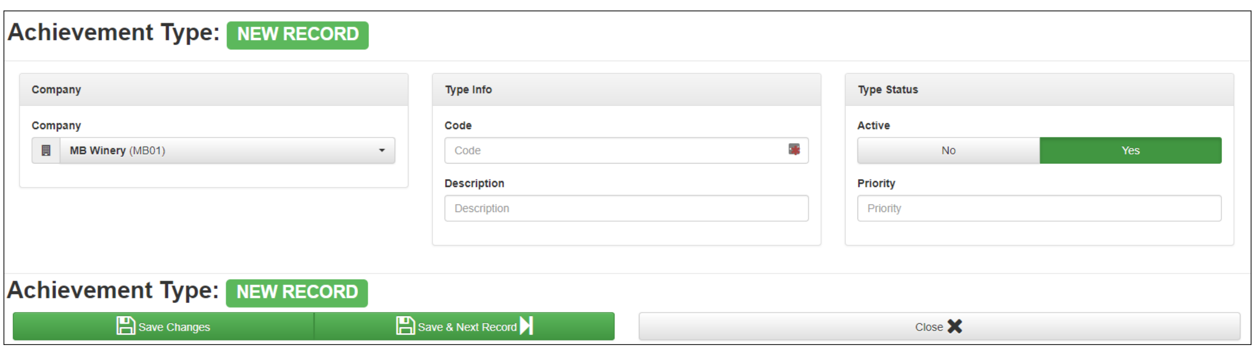
The system then narrows the results on the screen to display only those with "full".



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

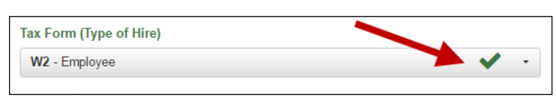
Adding and Changing Information

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



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

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



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.

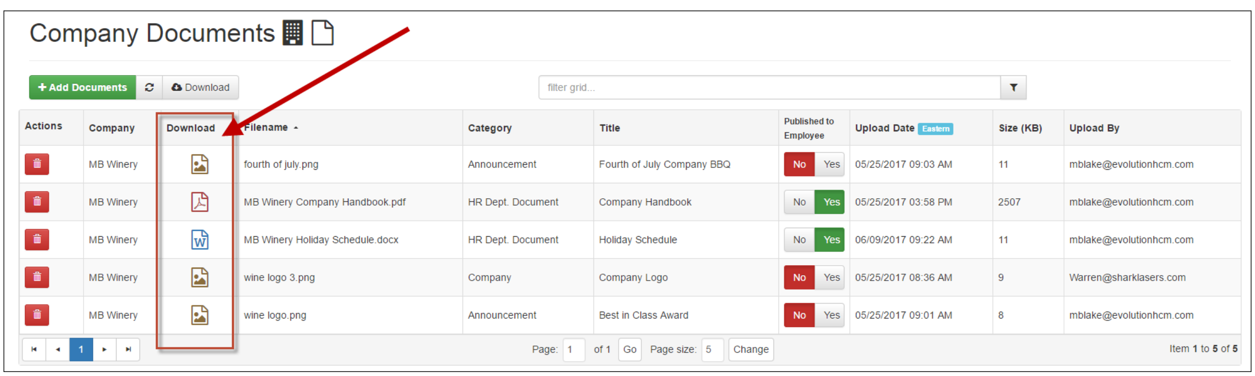
The

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 Begining Sales Training
SALES1	Passed Begining Sales Training
SALES3	Passed Advanced Sales Training

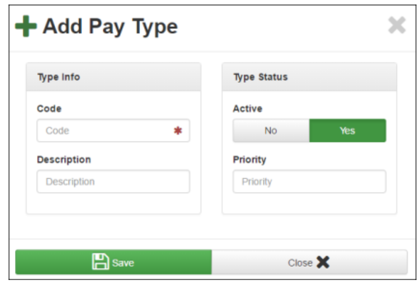
Tip: If you do not see the downloaded data, make sure in your Browser settings, the pop up blocker is disabled. Note that the specific name of this setting will vary by Browser.

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**.



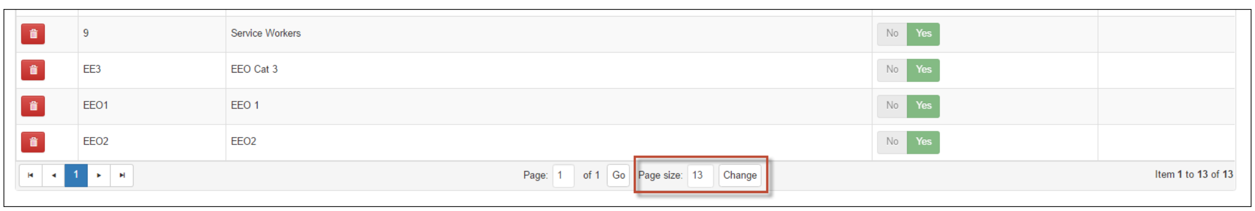
Some fields of Advanced HR 2.0 have a blue 'plus' sign (+) next to the field name. This means that you can add a new record to the dropdown "on the fly" and immediately apply the record you added.

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.

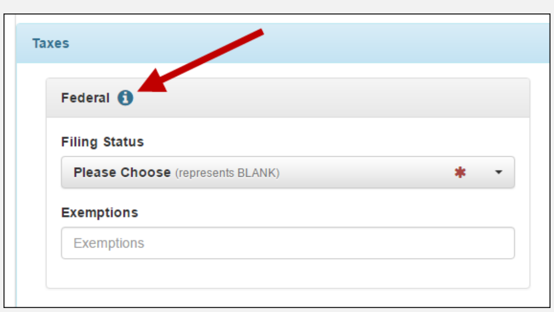


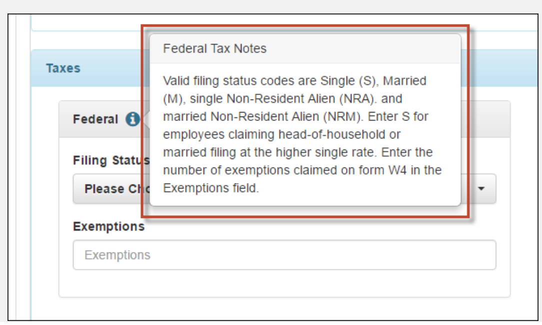
The advantage to using this feature is that you don't have to stop and display a different back-end type screen to add the new value to the system and then return to the screen where you then select that value you just added.

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.

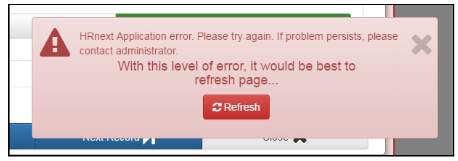


Some fields in Advanced HR 2.0 have information icons next to them – a blue circle with an "**i**" , see the following example. When you hover the cursor over a field with an information icon, the cursor displays a question mark near the arrow. You can click on the information icon to learn how to use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





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.

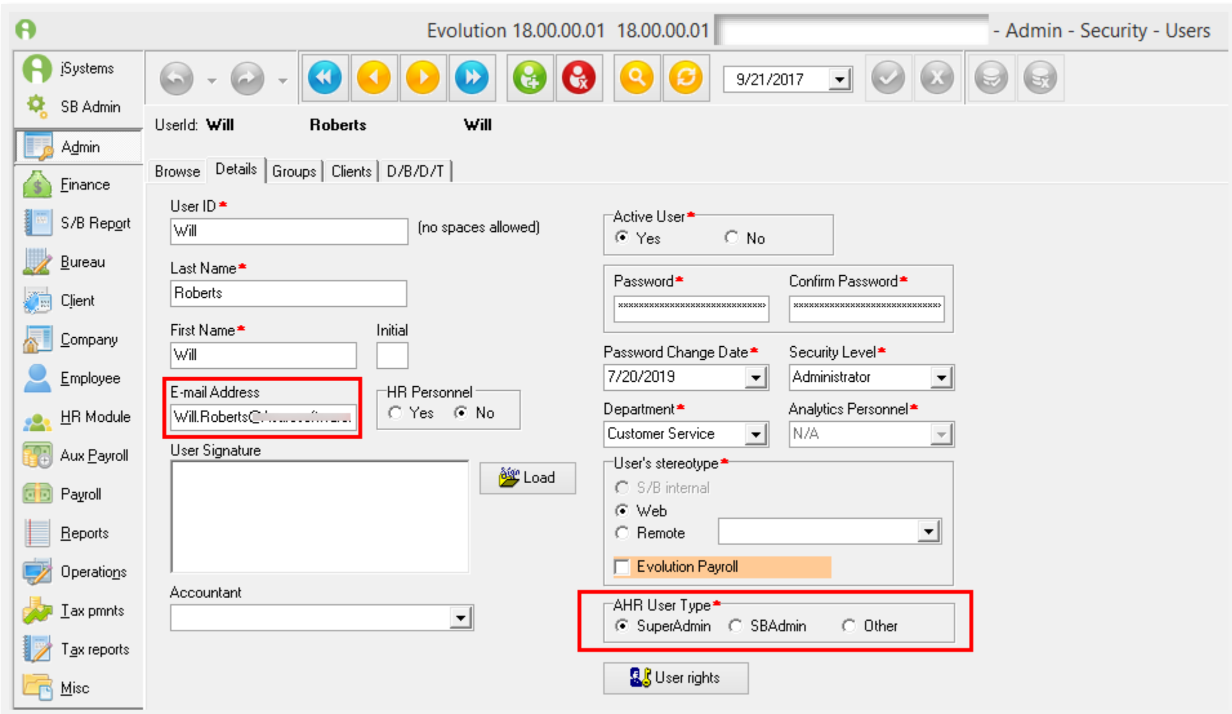
Creating Super Admin Users

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:



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:

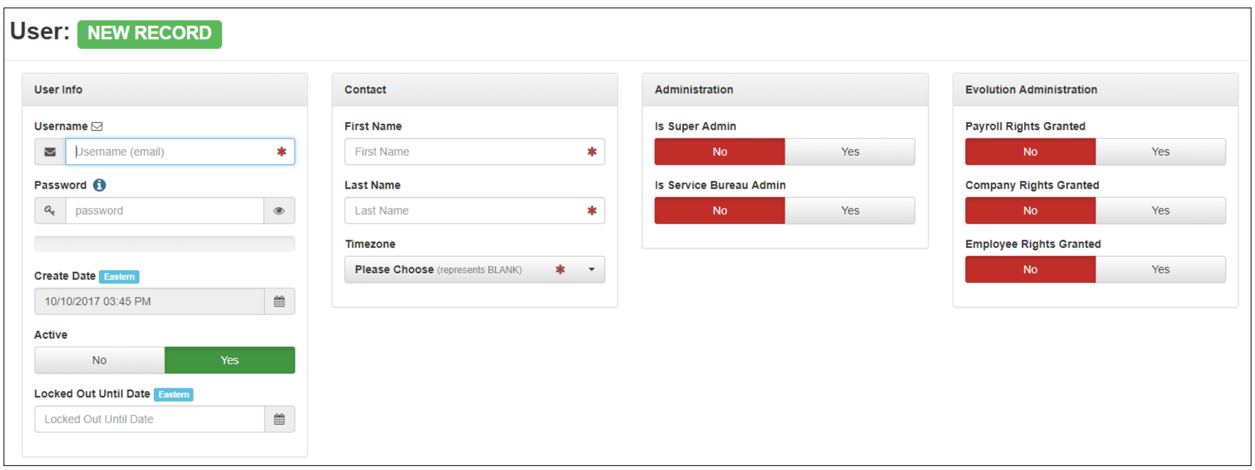
- Create Service Bureau Admins
- Assign Companies to Service Bureau Admins

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.



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.

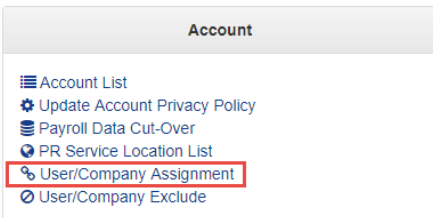
Assign Companies to Service Bureau Admins

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

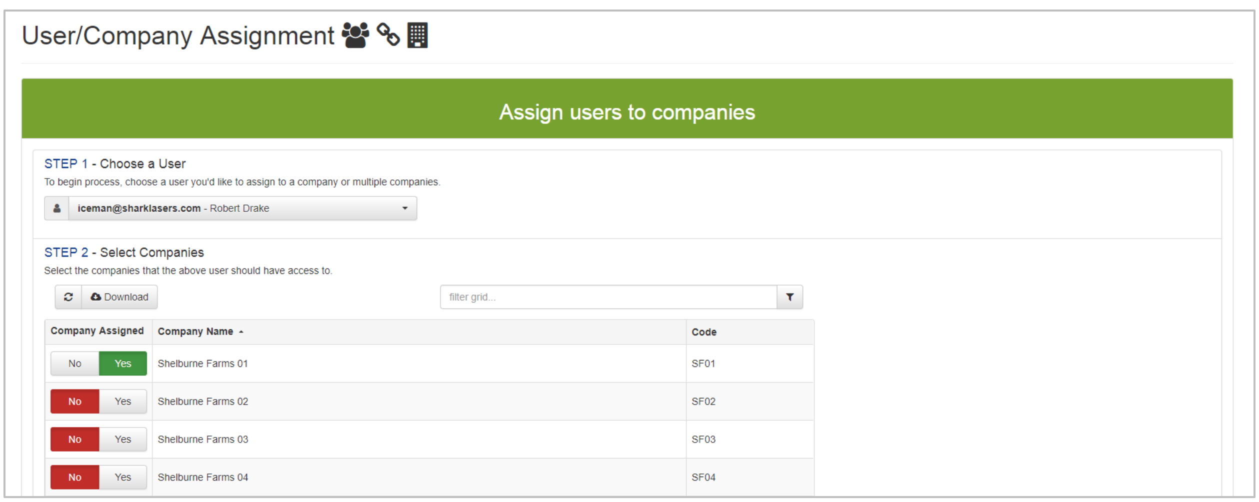
Note: If the company is not assigned to the **Service Bureau Admin**, the user will not be able to access any information regarding the company or its employees.

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.



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:

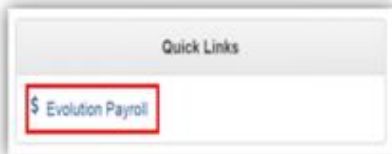
- Provides access to two systems.
- Once turned on, it is on for ALL Evolution users.
    - Users will be taken to a new login screen.
- Requires some pre-work before it can be enabled.
- Requires the Service Bureau to be on the Stowe version of Evolution Classic.
- SSO is only for users that need to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

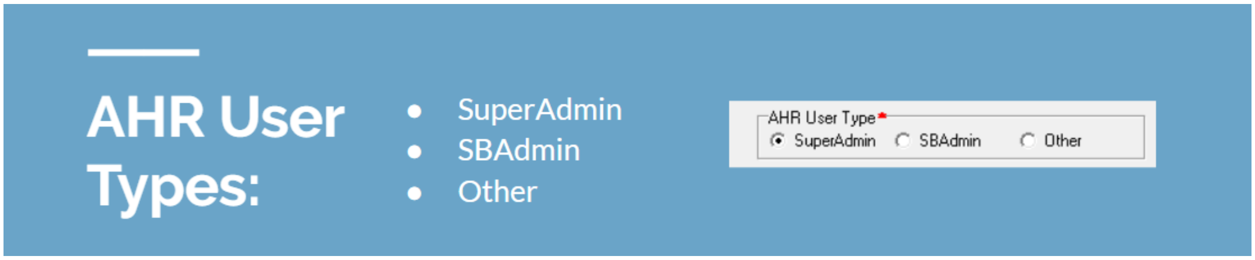
The following is a list of the setup requirements for Evolution **Single Sign On**. More details are discussed below the list for most items.

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.

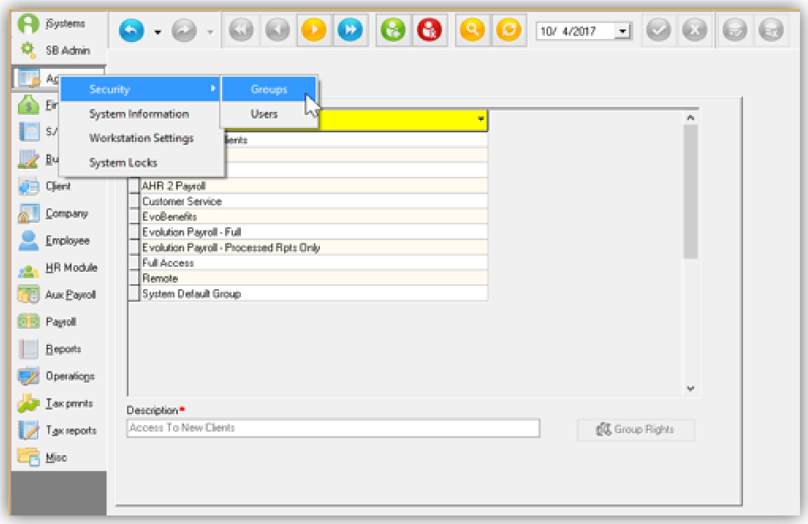
Client User Setup

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

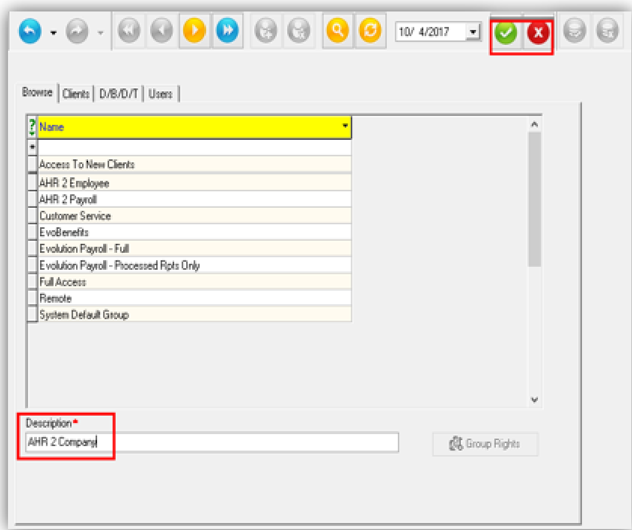
AHR 2.0 Security Groups Setup

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.

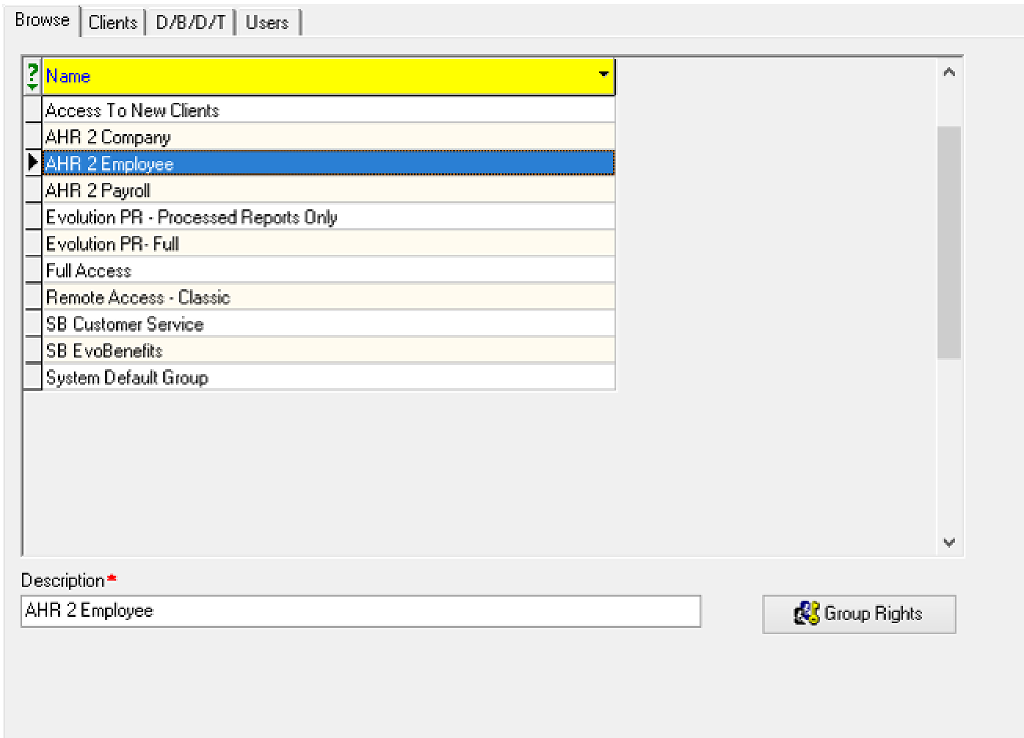
Security Groups must be created in Evolution Classic to be assigned to Users. The Groups MUST be named as they are above.

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.

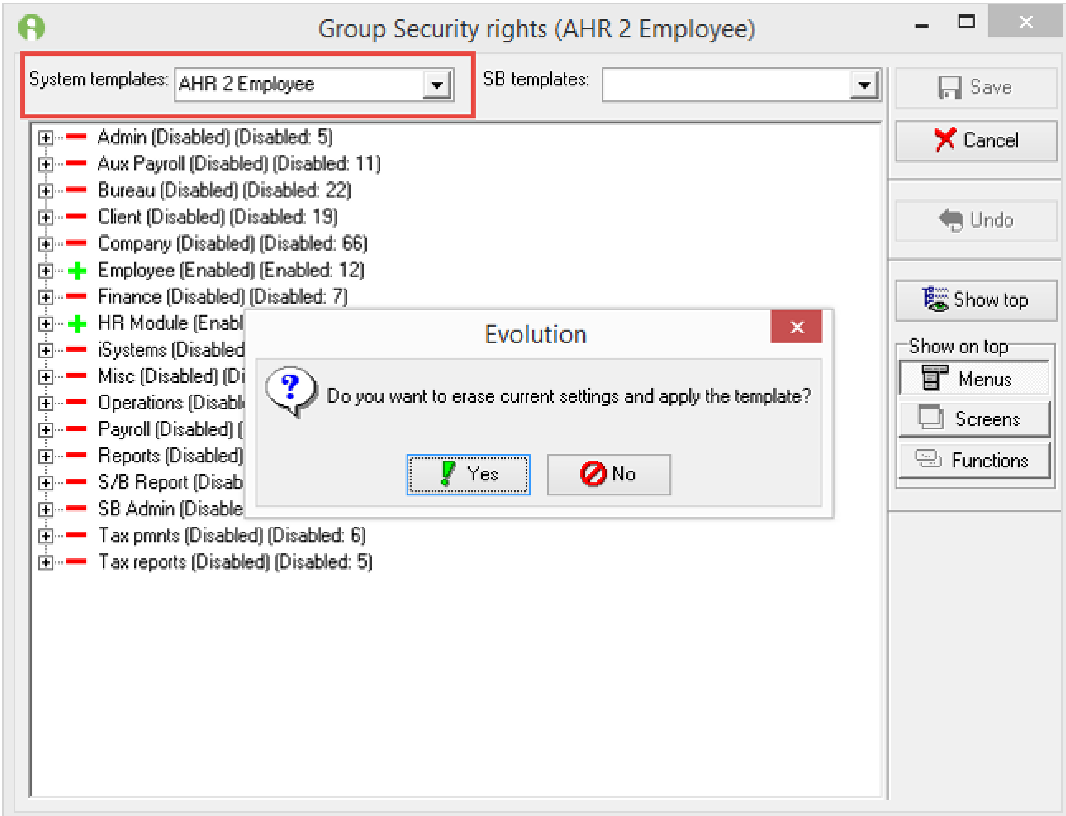


2. Click on the plus sign to create a new record.
3. Enter the name of the group EXACTLY as the Security Templates are named:

   AHR 2 Company

   AHR 2 Employee

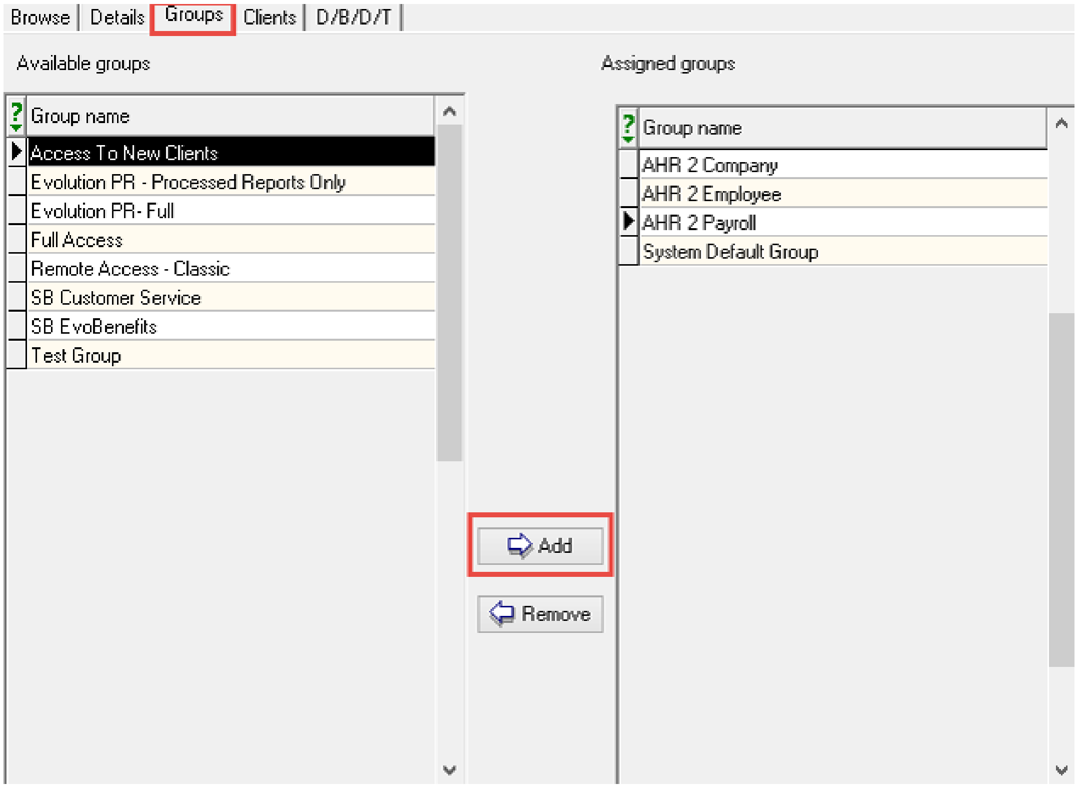
   AHR 2 Payroll
4. Click on **Post and Commit**.
5. Click on the **Group Rights** button.
6. Select the AHR template from the **System Template** dropdown.
7. Click on **Yes** when the system asks if you want to apply the template.
8. **Save** and repeat the previous steps until all 3 security groups have 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.

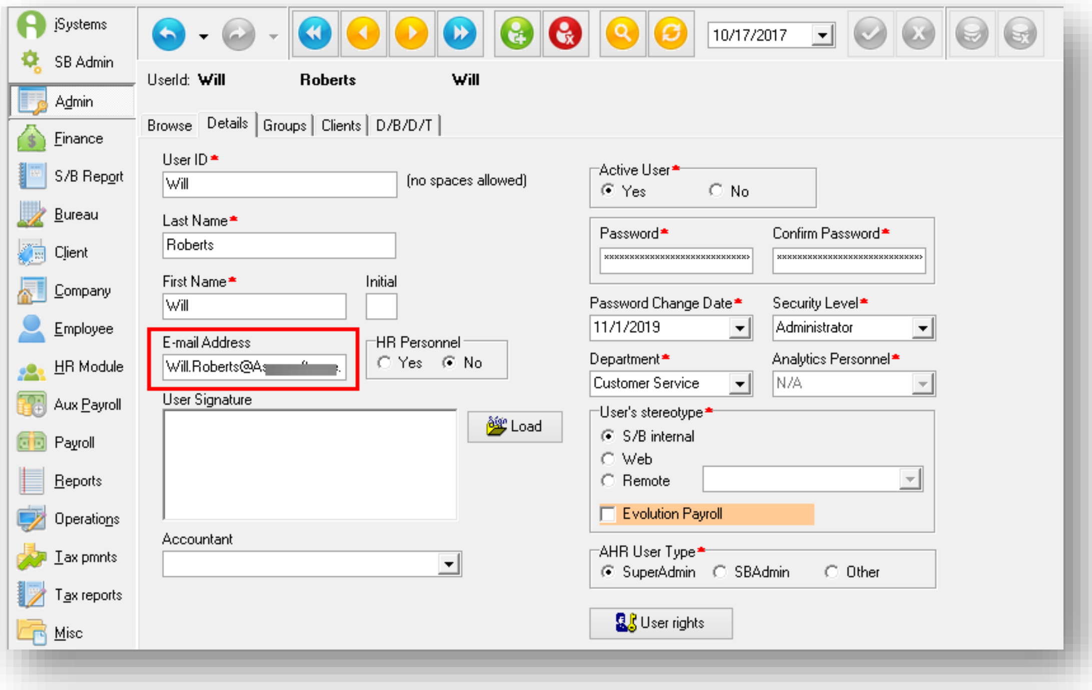


These groups MUST be added to your Internal Service Bureau Staff that will access Advanced HR 2.0, as well as your clients that will access Advanced HR 2.0.

Payroll and Service Bureau User Email Address

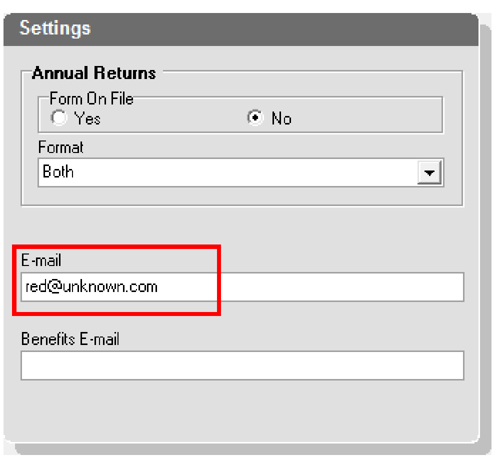
Evolution Classic user email addresses are required for all **users** when **Evolution Single Sign On** is activated. While managing security groups, this is a good time to ensure that all users have an email address listed on their user detail record.

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



Employee Email Addresses

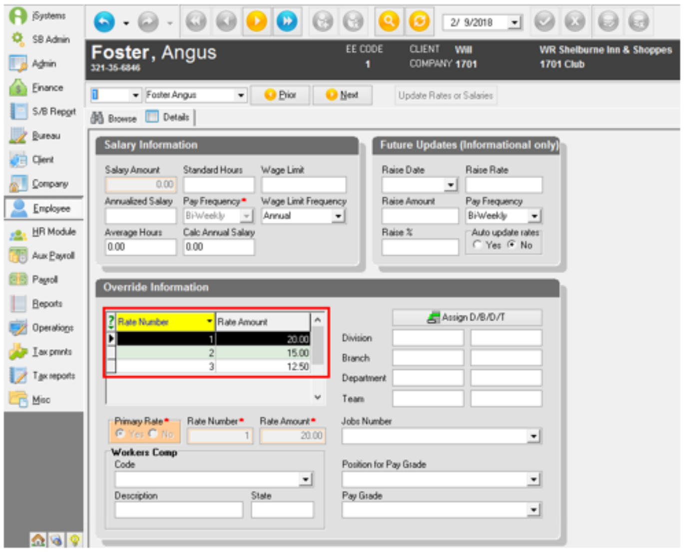
Employees must also have a valid, unique email address entered in the **Employee – Employee, Self-Serve, Settings** pane in Evolution in order to access the Employee Self Service and their **Employee Dashboard**. These will become the **Usernames** for the employees in Advanced HR 2.0.



The 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.

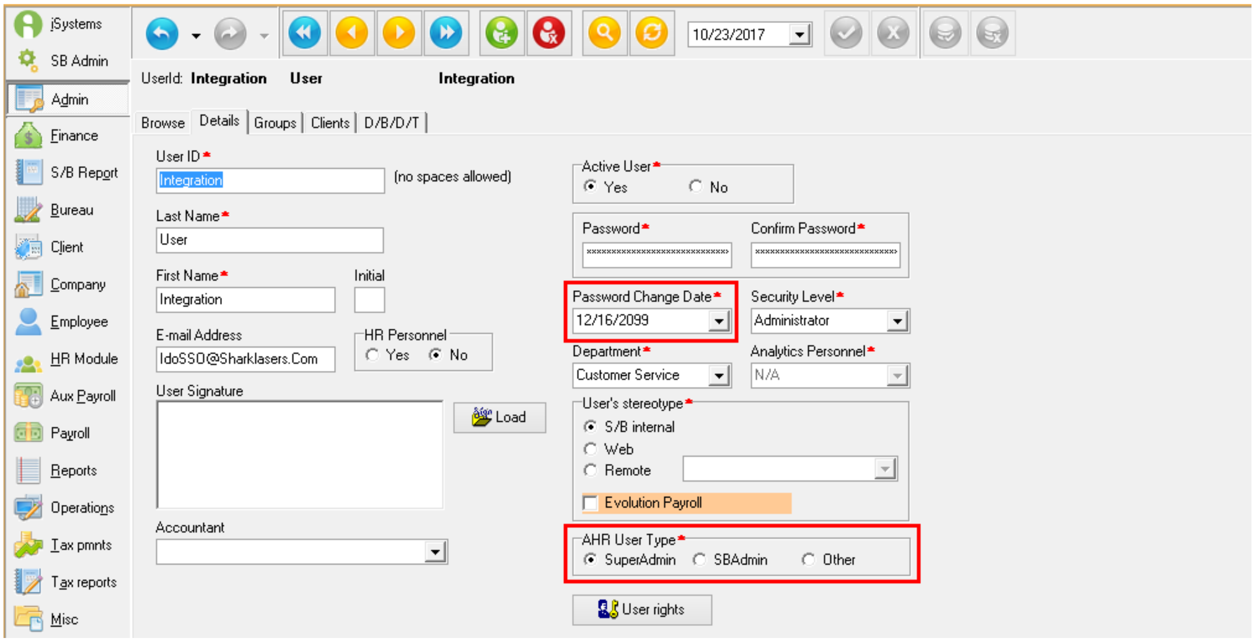
For those users who only need Advanced HR 2.0 access, they will login as normal, and do not need SSO functionality, although they also use the new Evolution login screen.

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.

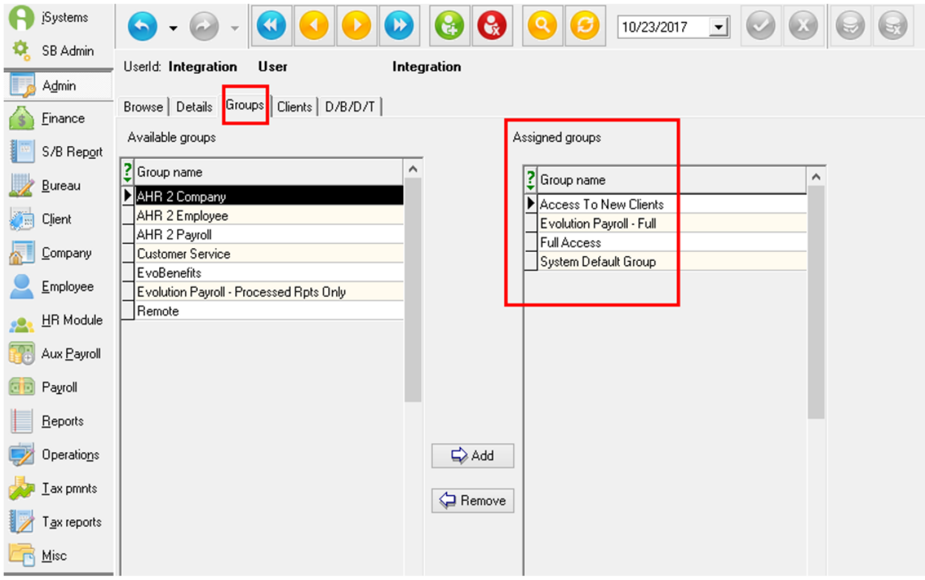
Creating a Service Account User in Evolution Classic

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**.



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**.

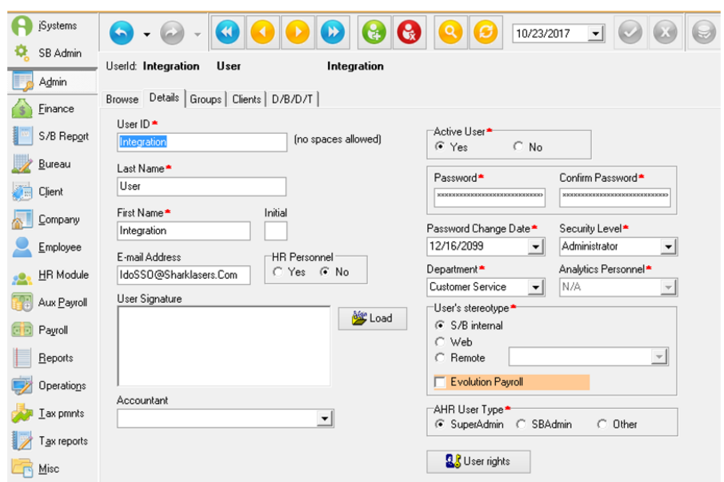
If your Full Access group has been modified, update the user rights for this User ID to have Full Access.

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:

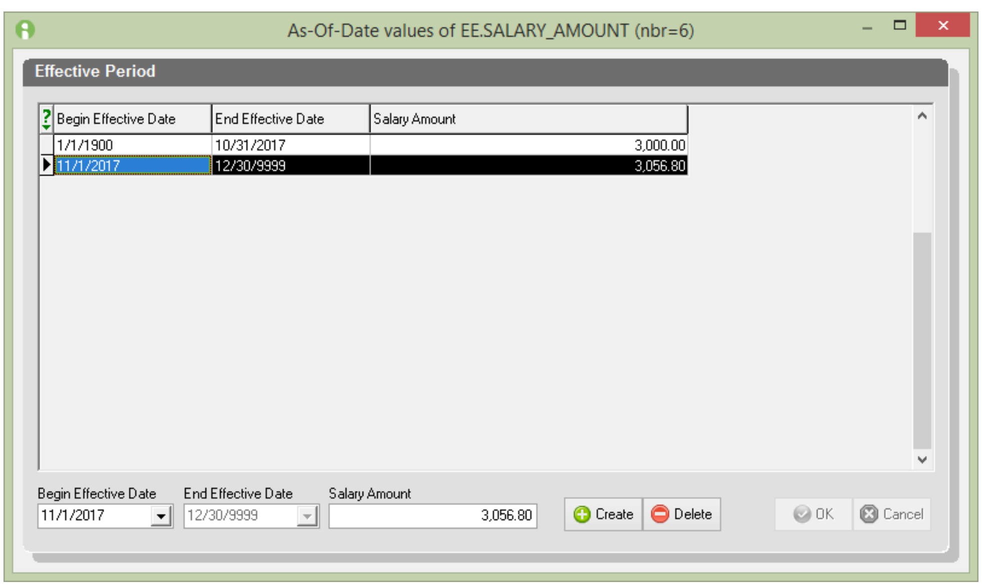
- Name (First, Last, Middle Initial)
- SSN
- Status Code
- Salary / Rates
- DBDT
- Default Worker's Comp Code

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**.



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

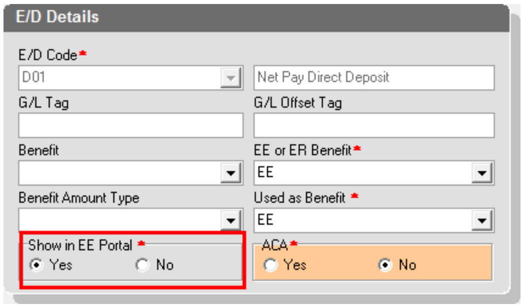
In order for W-2 and other Tax forms to show in the Employee Self Service in Advanced HR 2.0, the settings in the **Annual Returns** section of the **Employee – Employee – Self Serve** tab in Evolution Classic must be updated to:

- **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.

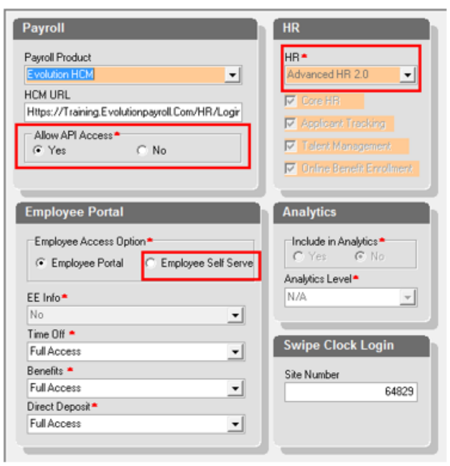


Company Info

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.

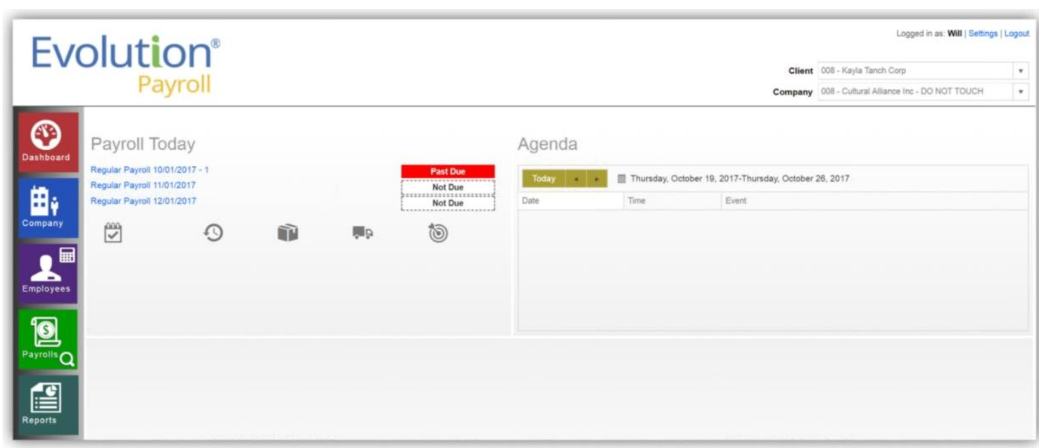
We recommend that users do not create the bookmark in their browser until after they are past the Single Sign On (SSO) login screen and are actually in the system. The reason for this is creating a bookmark at the SSO login screen may not work due to the redirection task that this feature performs behind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

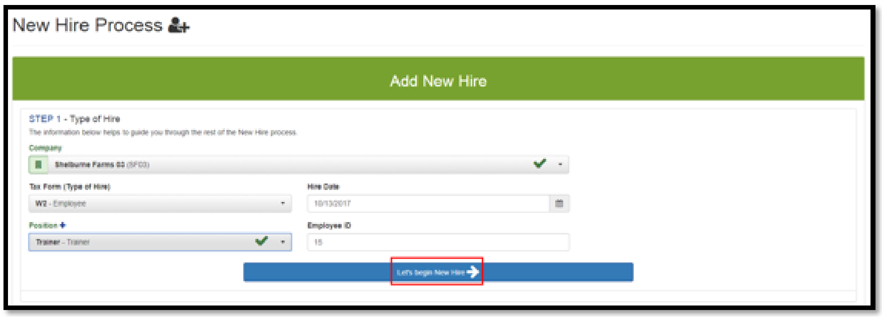


The user can now utilize any payroll function that they would normally have access to.

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**.

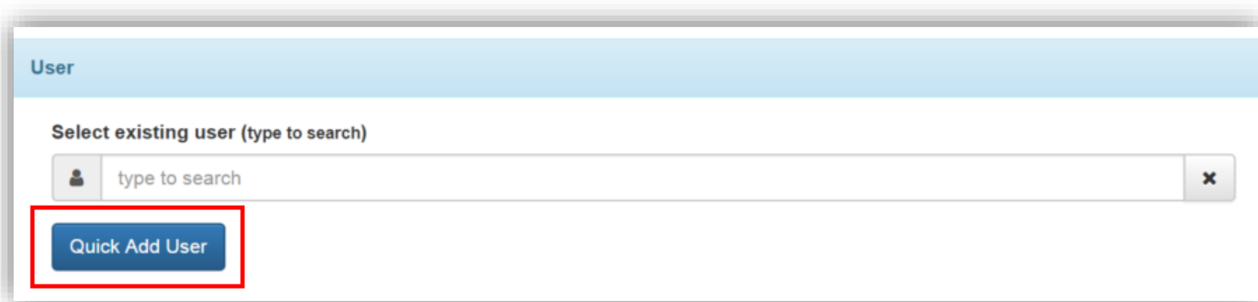


When **Add New Hire** is clicked, the New Hire Process wizard will open.

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

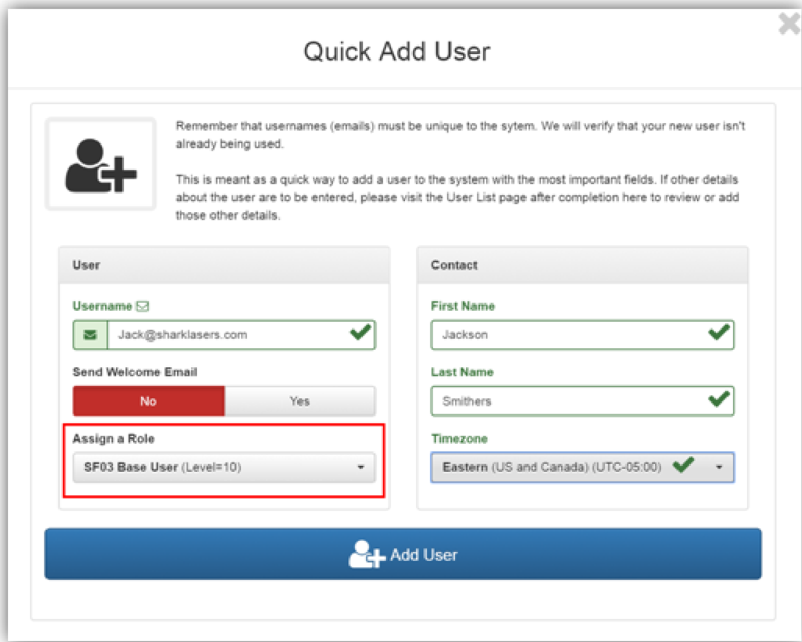
As part of Onboarding, it is highly recommended that you create a user while you are entering the preliminary information for the New Hire.

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



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

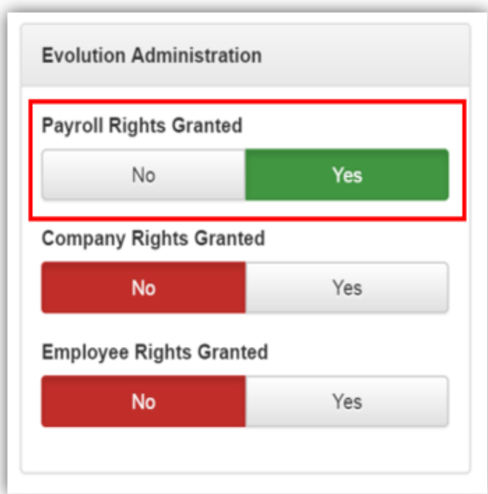
- Create Username
- Edit Contact info
- Send a Welcome Email
- Assign a Role



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.



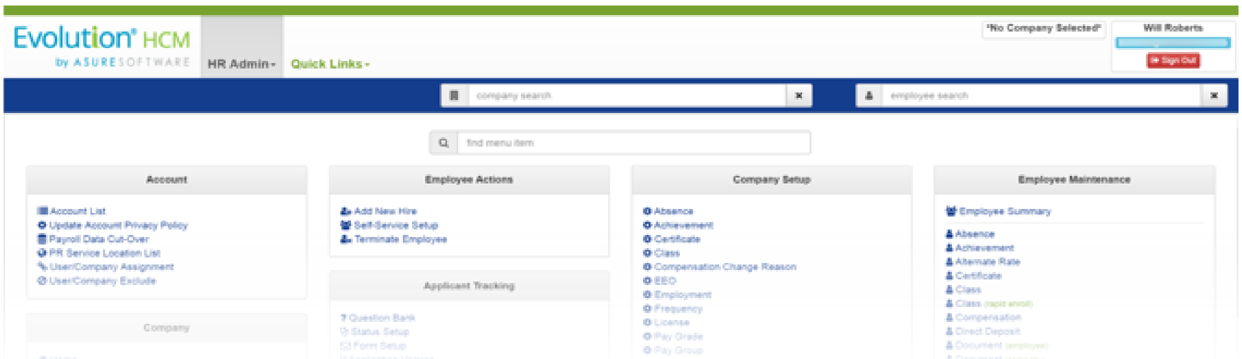
Go to **HR Admin – Company - User List** and select the user.

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.

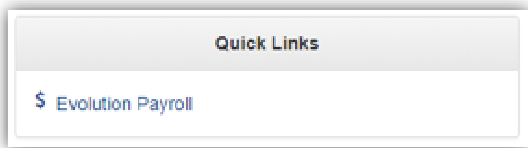
HR Admin Menu Items

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.

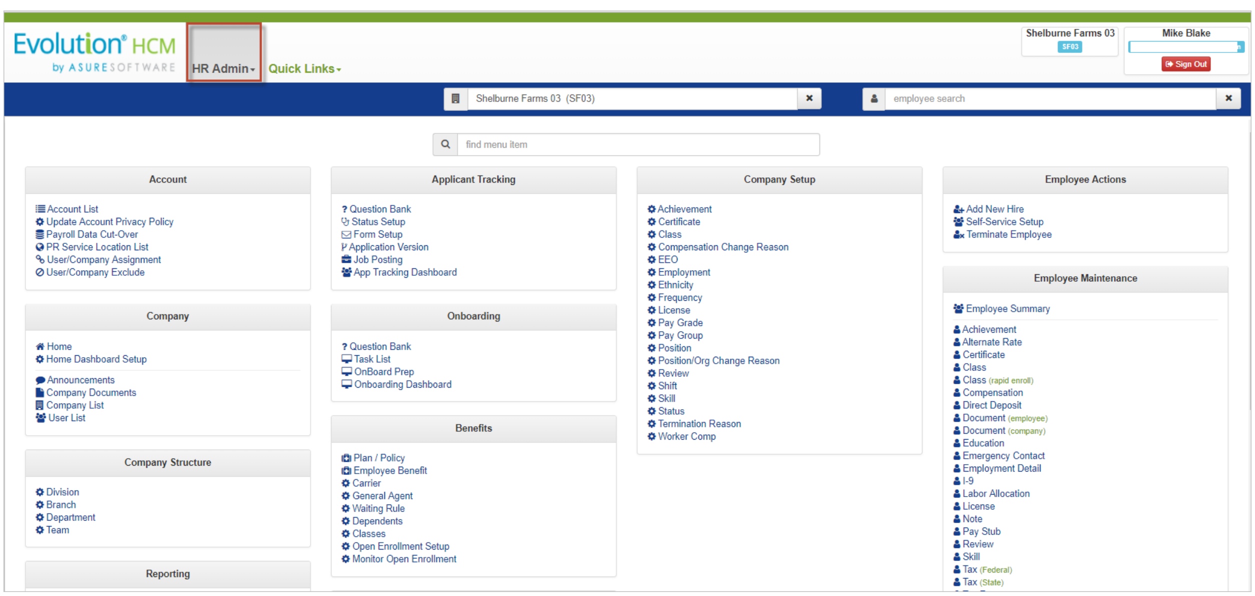


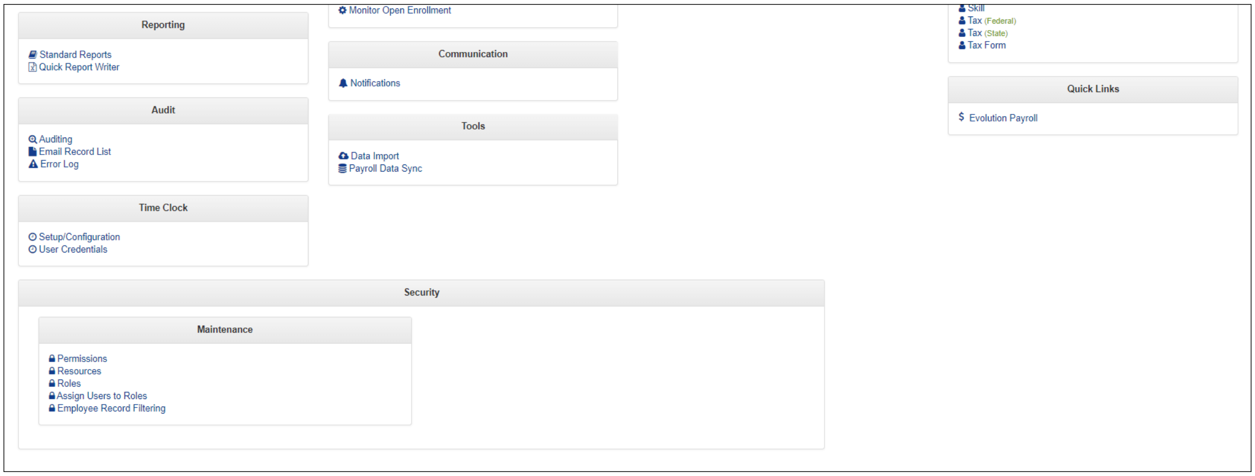
The HR Admin menu tab is where you'll go to access:

- 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

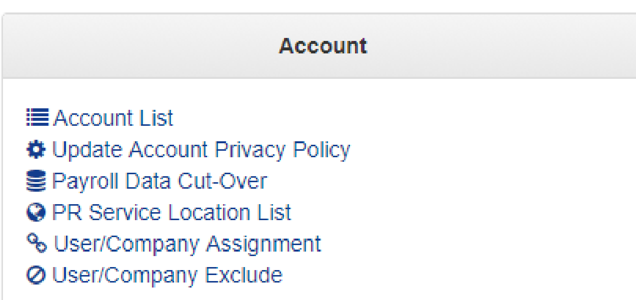
Note: Employee users should refer to the separate document *Advanced HR 2.0 Employee Self Service User Guide* to see how these screens configured by the administrator look from the employee point of view. The *Employee Self Service User Guide* does not contain the configuration and setup information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

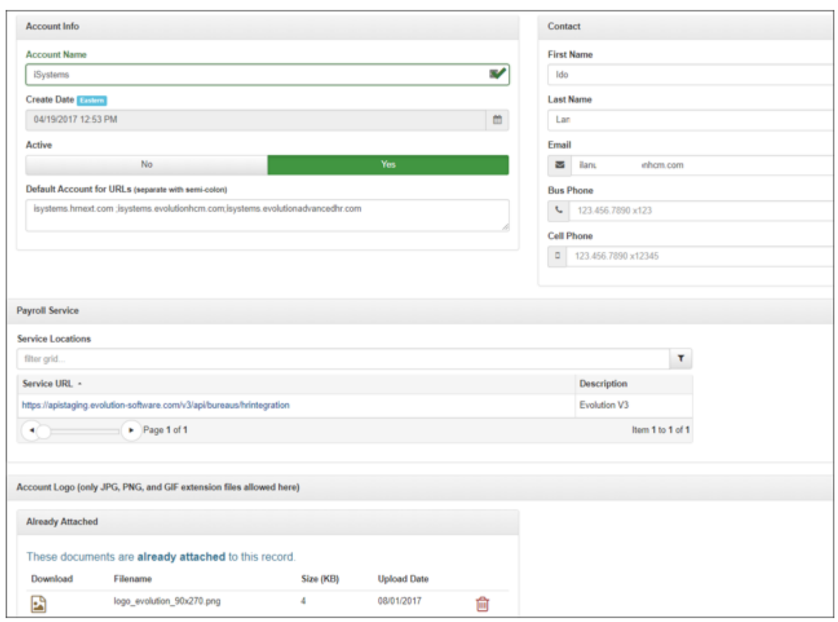
Note: Once this is complete you will not need to set this up again. You will not be able to onboard any clients until this step has been completed.

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**.

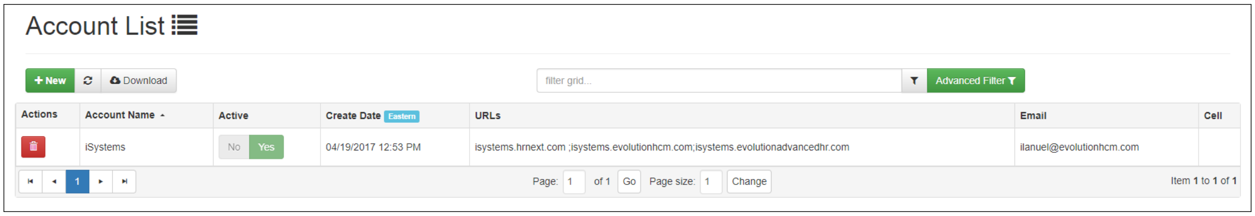
Go to **HR Admin – Account – Account List**

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

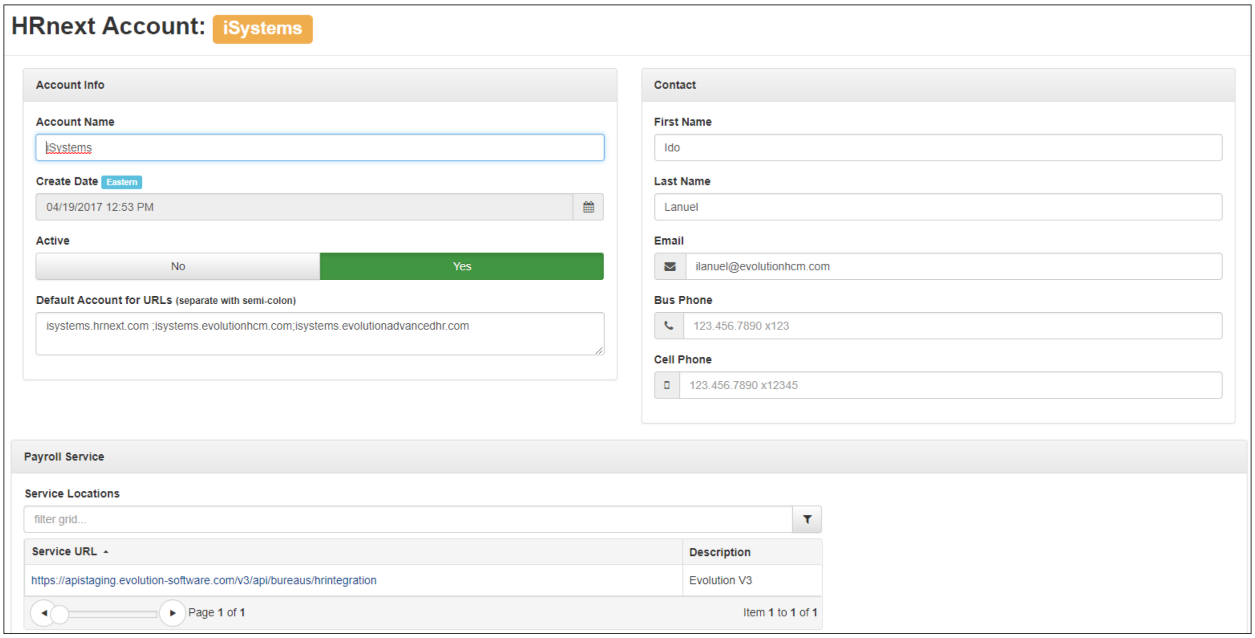


Note: The Service Bureau logo file size should be no larger than **90 pixel height by 320 pixel width.**

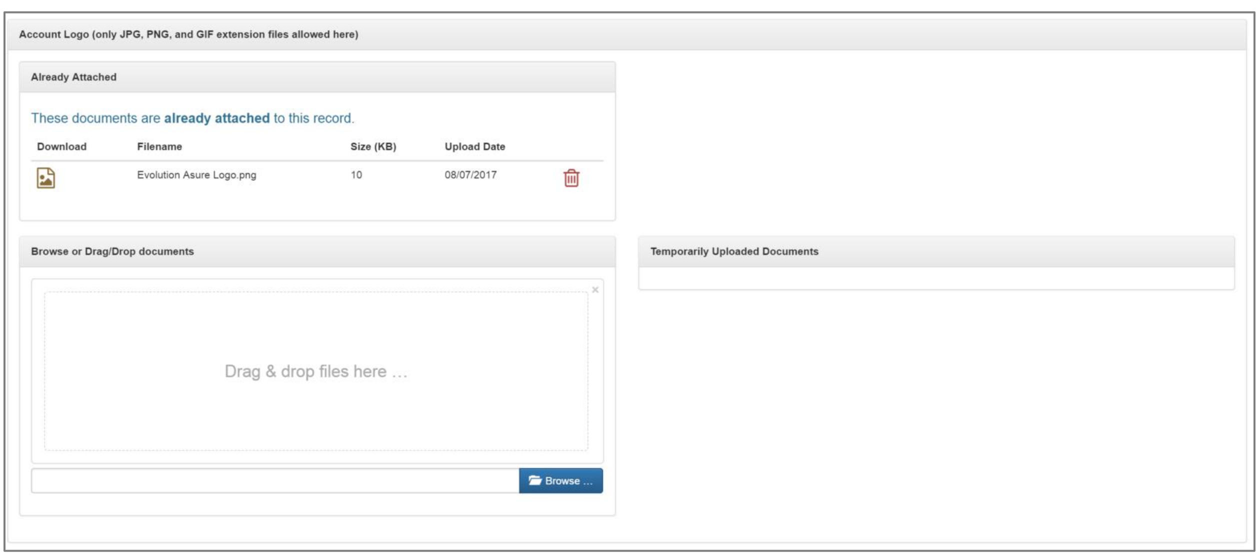
Go to **HR Admin – Account – Account List**.



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



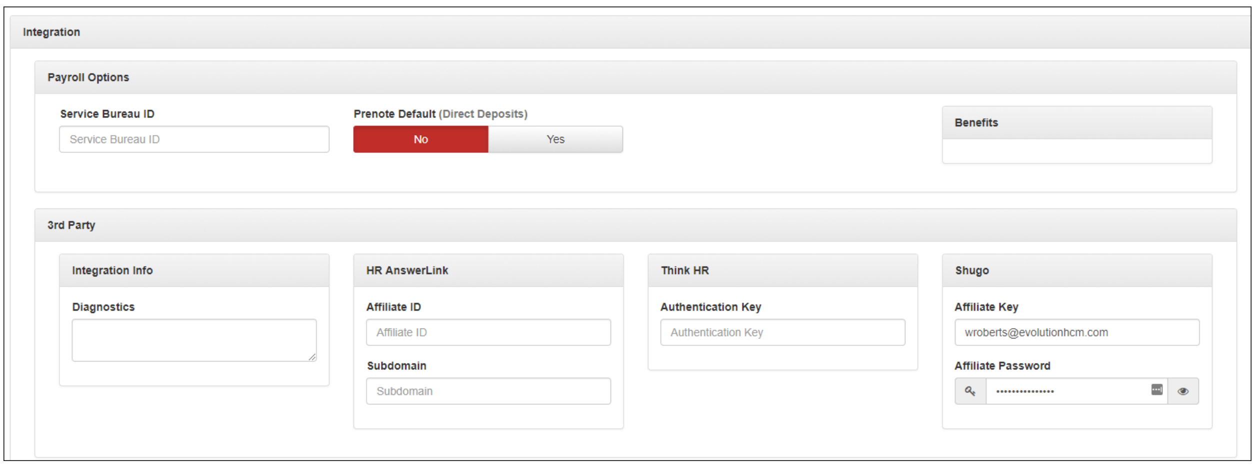
When uploading the Service Bureau logo, keep it small and simple. The File size should be no larger than **90 pixel height by 320 pixel width**.

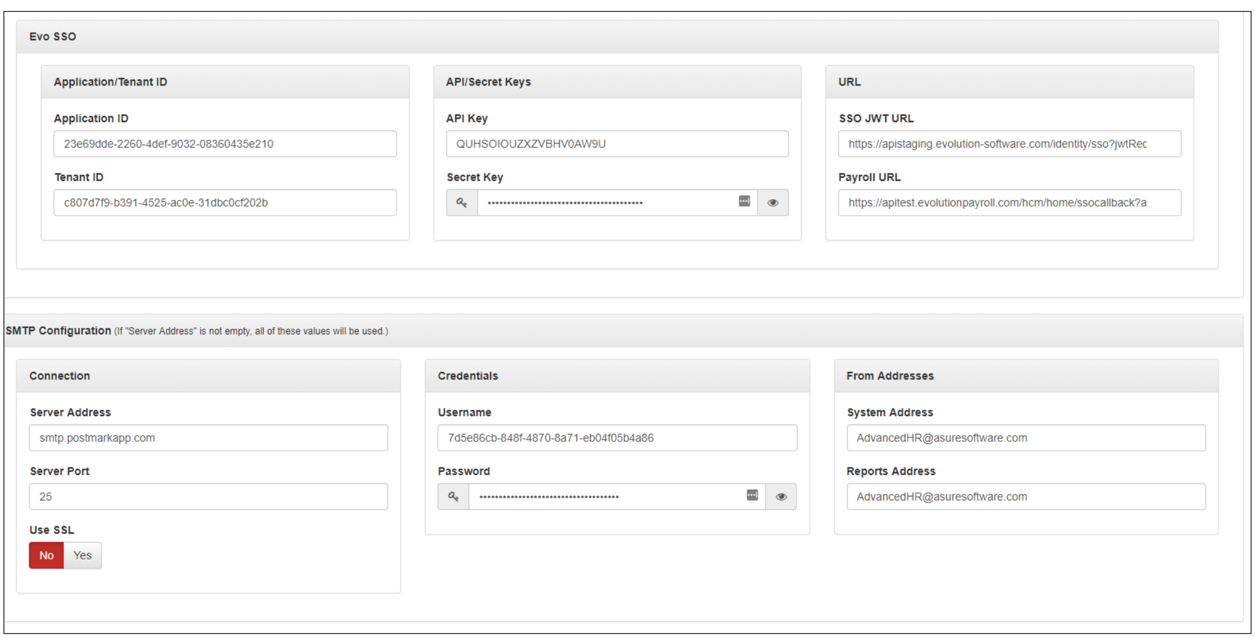


Either use the **Browse** function to upload from your computer, or you can just drag and drop your logo into the box. Please note that the system will take any size logo that you upload. But remember to keep the logo size to the pixel size recommendation above and also keep the file size small as well. 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.





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

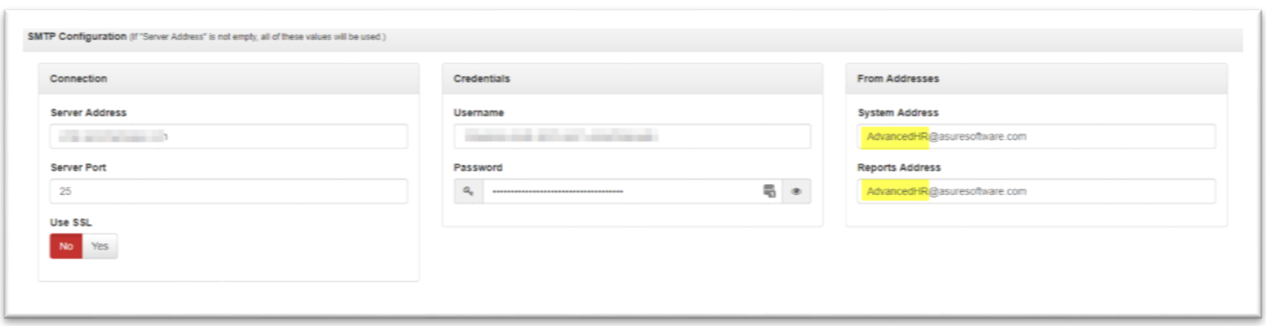
Email communications are sent from AHR 2.0. The name on the email is Advanced HR using the email address AdvancedHR@asuresoftware.com

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.

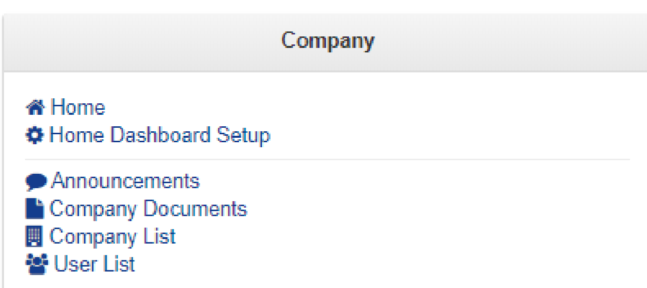
From name: ______________________

Email: ________________________ @asuresoftware.com



Company Menu

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



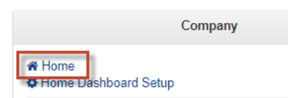
Once the company has been onboarded to Advanced HR 2.0, there is some setup that is required. The company setup is done in two locations:

- **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.

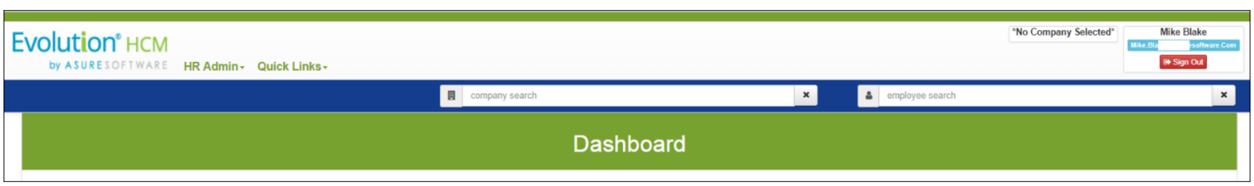
Home

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:

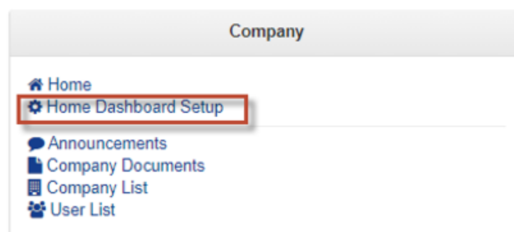
- Company Announcements
- Upcoming employee Birthdays and Anniversaries
- Employee Certificate and License Expirations
- Employee Scheduled Reviews

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.

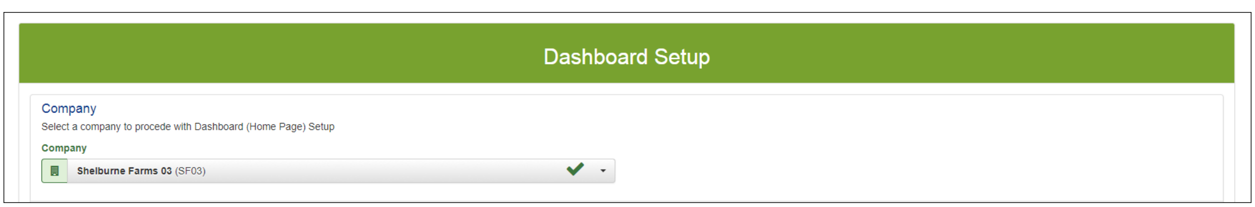
Company Dashboard Setup

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.

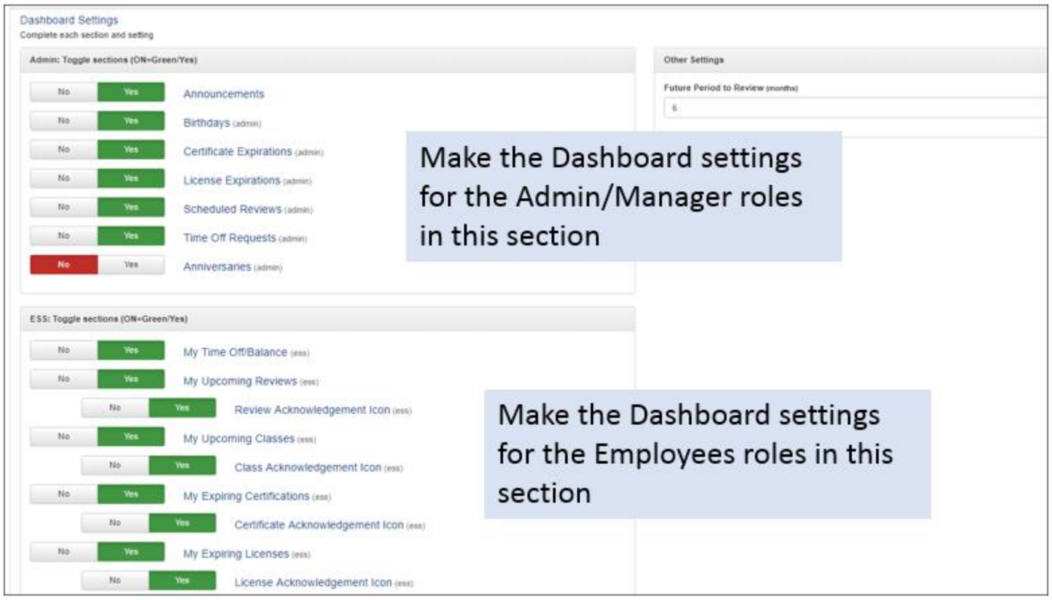
The Dashboard functions as the employee's ESS.



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.



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.

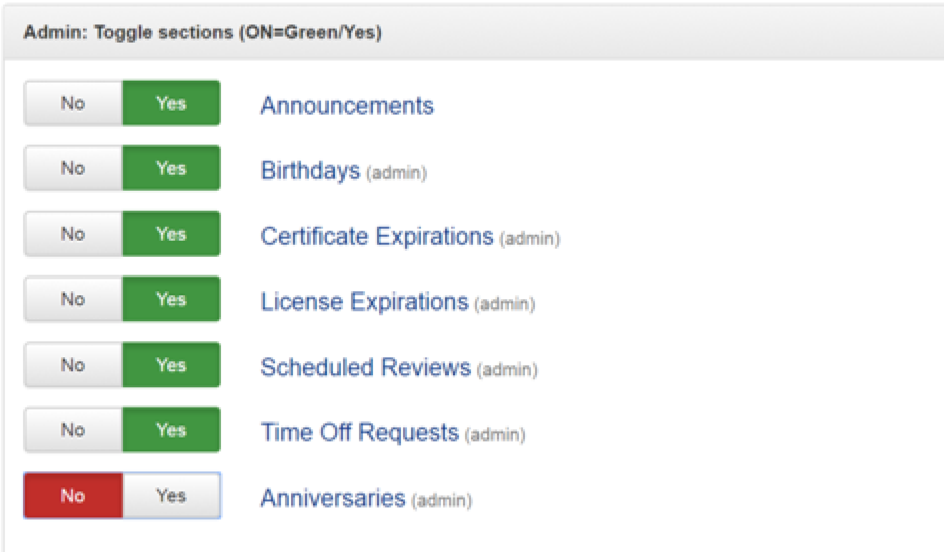
Select your company from the **Company** dropdown, which displays the companies that have already been onboarded from Evolution Classic into Advanced HR 2.0. You must be a **Base Admin** or higher security level to be able to make the Company Dashboard Setup settings.

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).

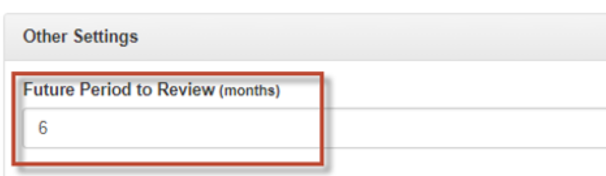
Setting the Dashboard View for the Base Admin and Base Manager Roles

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.



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:



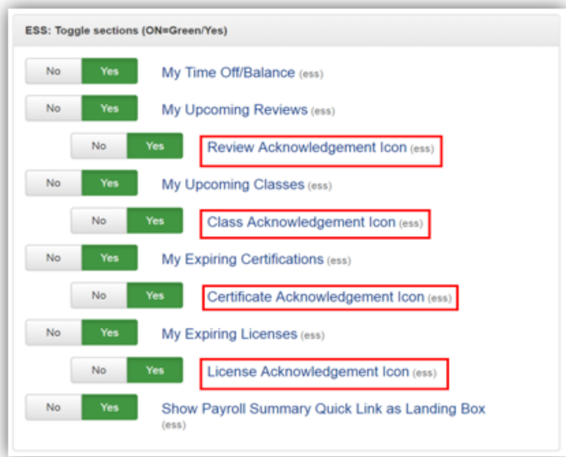
Set a Review Period in months.

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.



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:

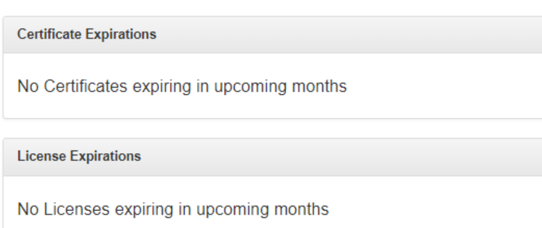
- Their upcoming **Reviews**
- Upcoming **Classes** they've enrolled in
- Any expiring **Certifications** or **Licenses**

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

- Employee reviews
- Classes
- Expirations

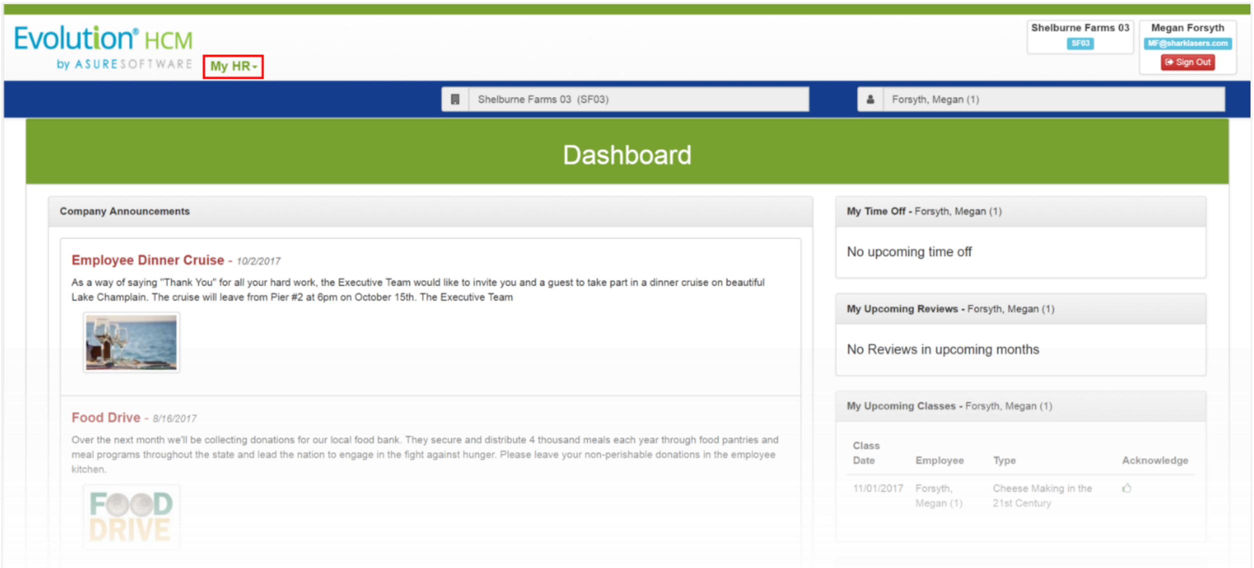
Always remember to click **Save Changes** when complete.

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

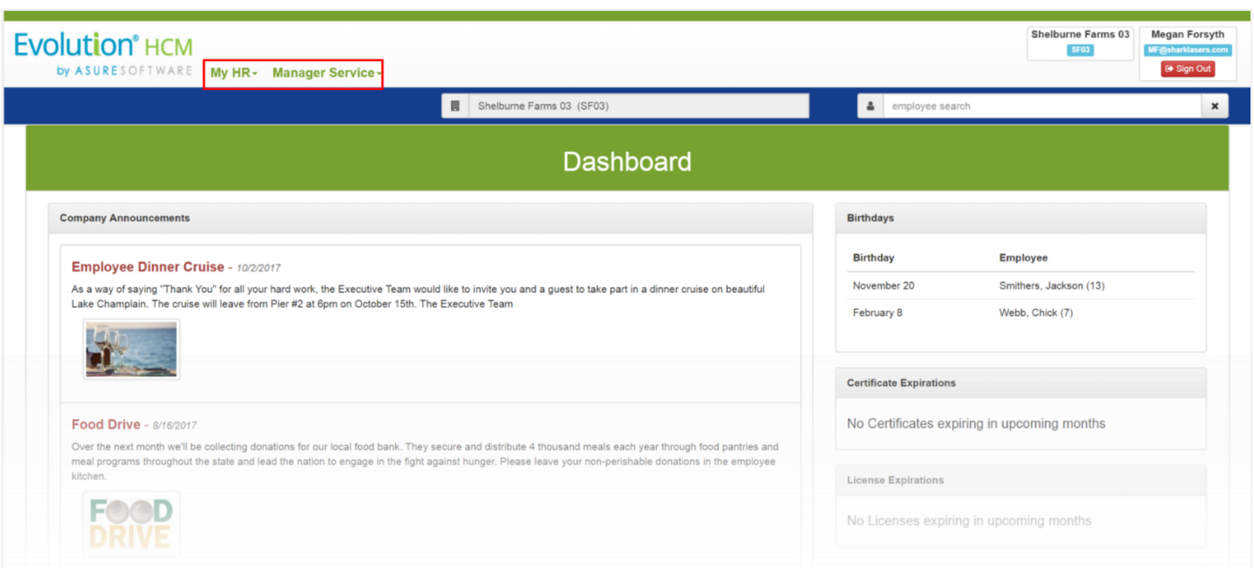


Now that the Dashboard settings for the Base Users, Base Manager, and Base Admins have been set, when those users login, they will be taken to the appropriate Dashboard view. Let's examine what these different roles will see.

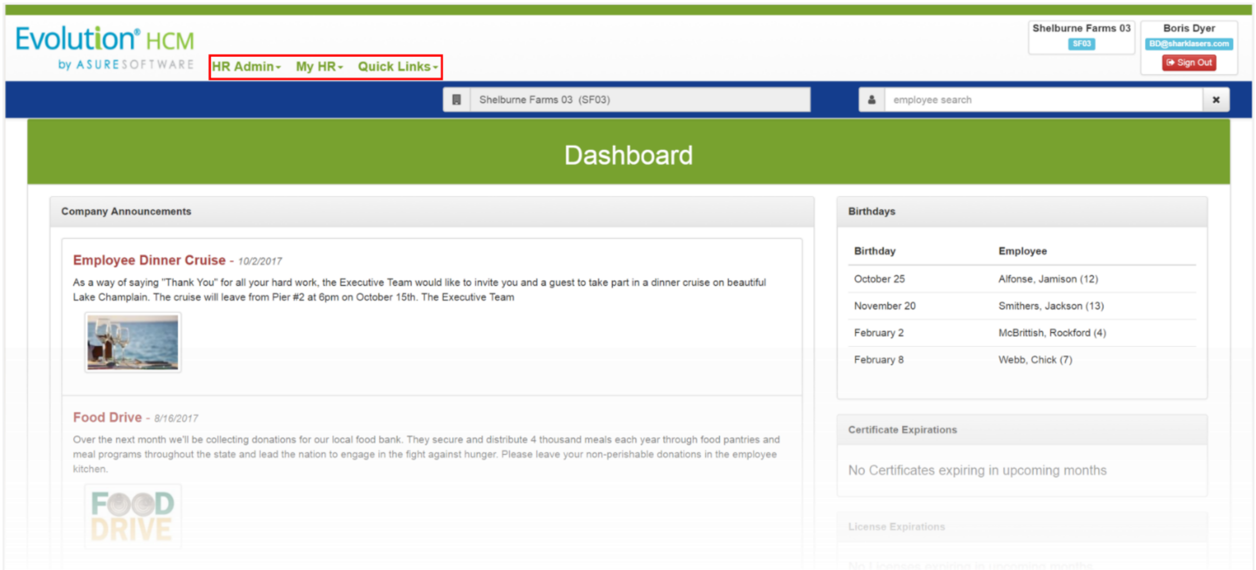
Base User Role Company Dashboard



Base Manager Role Company Dashboard



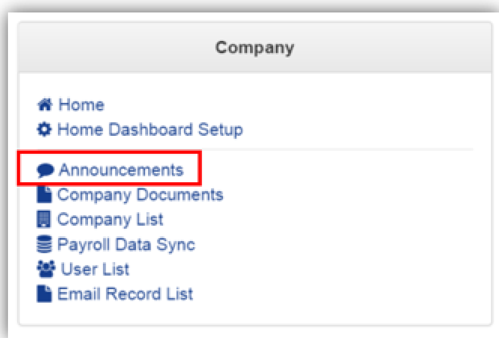
Base Admin Role Company Dashboard



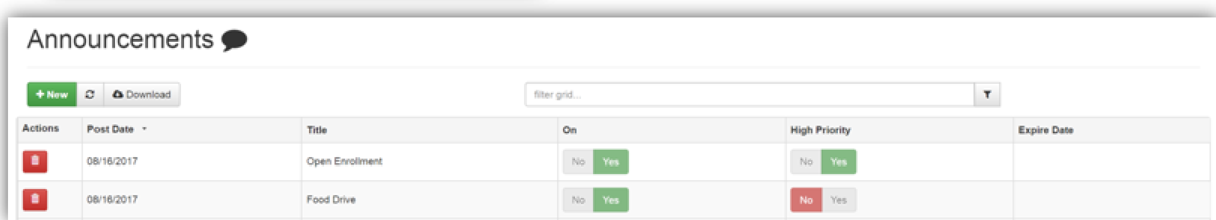
Company Announcements

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

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

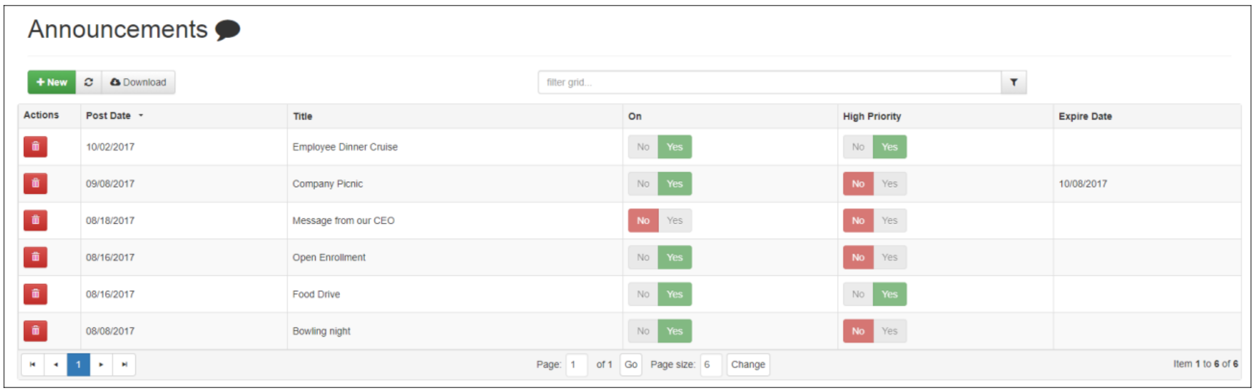


To create a new Announcement, simply click on the green **New** button.



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.

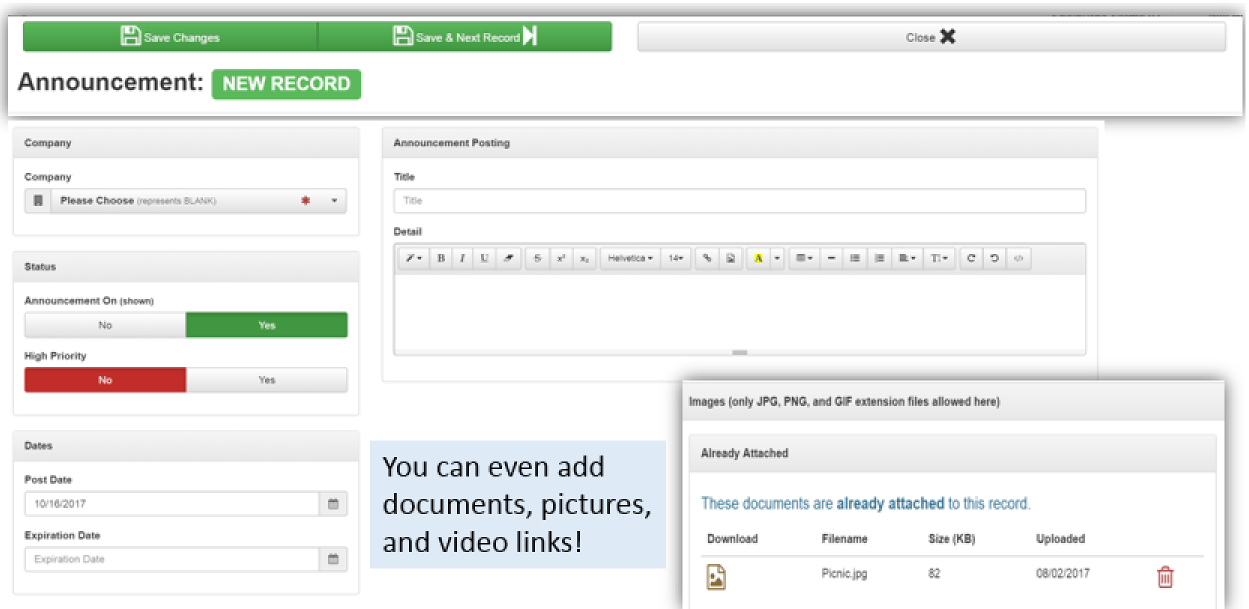


You can also add documents, pictures, and links to videos in the **Announcements** screen.

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

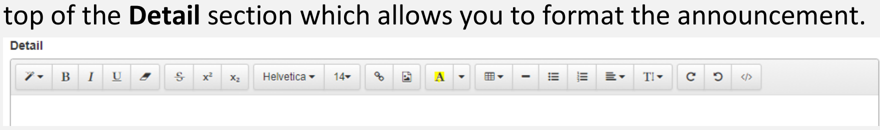
To open an announcement, click on an announcement row on the Dashboard. You can easily create and customize any announcement that will appear on all the employee Dashboards.



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 

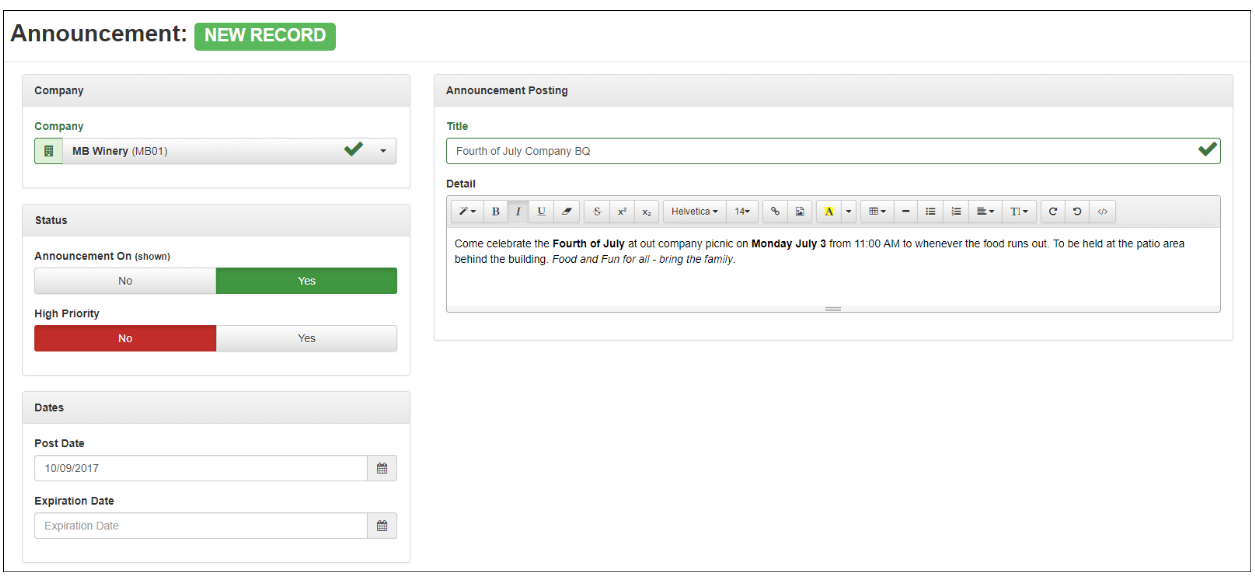
to display the Add Announcement dialog box. This is where you will add your content, set the announcement visibility and priority, and the posting and expiration date. You also have the ability to either drag and drop or browse and select images for each announcement.
4. Complete the information as described 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	

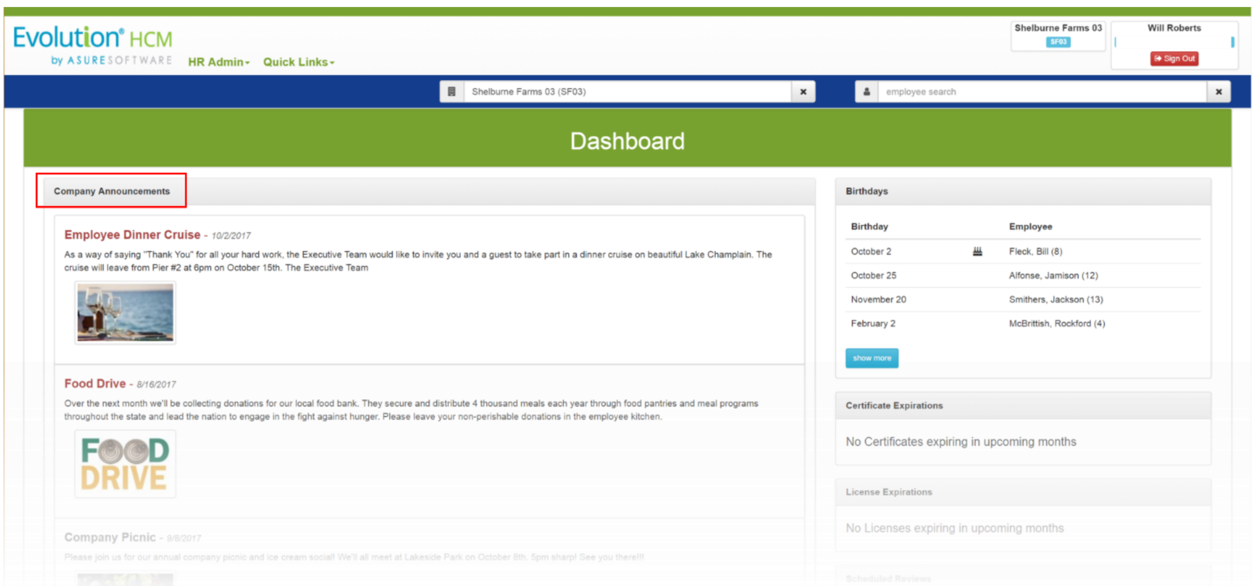
5. Click **Save Changes** or **Save and Next Record** if you have another announcement to add.

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



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.

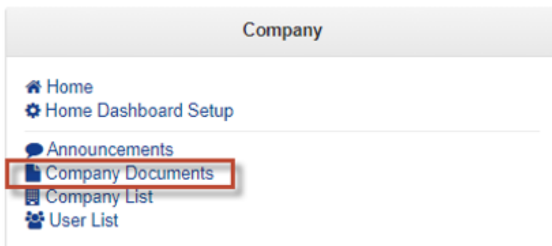


Company Announcements Display on the Dashboard for employees

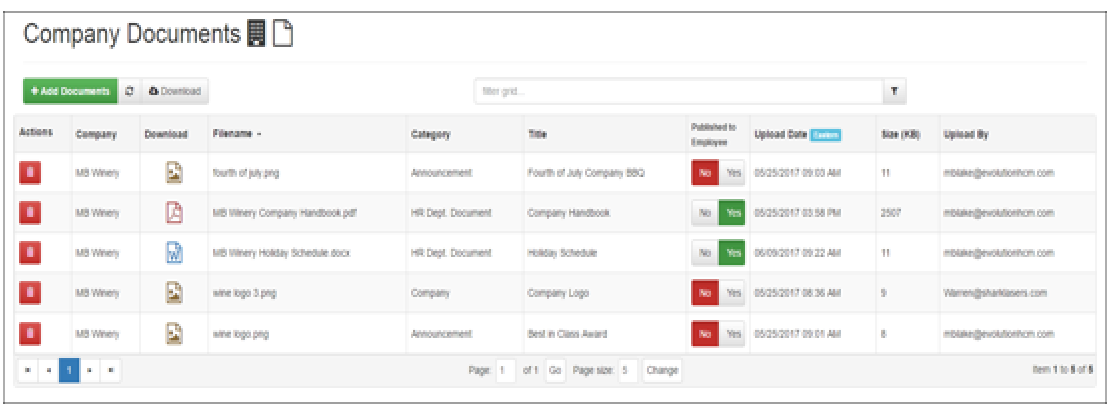
Company Documents

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**



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.

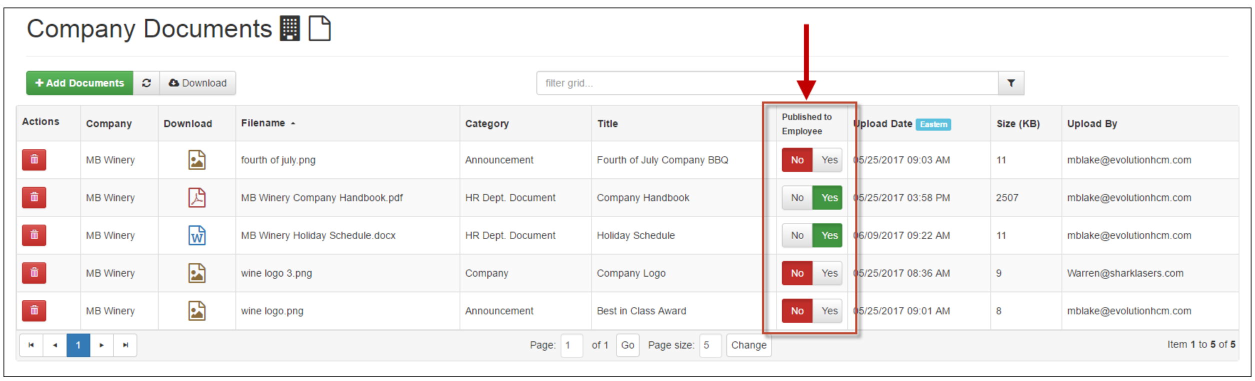
Click the green **Add Documents** button to upload documents.

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.



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.

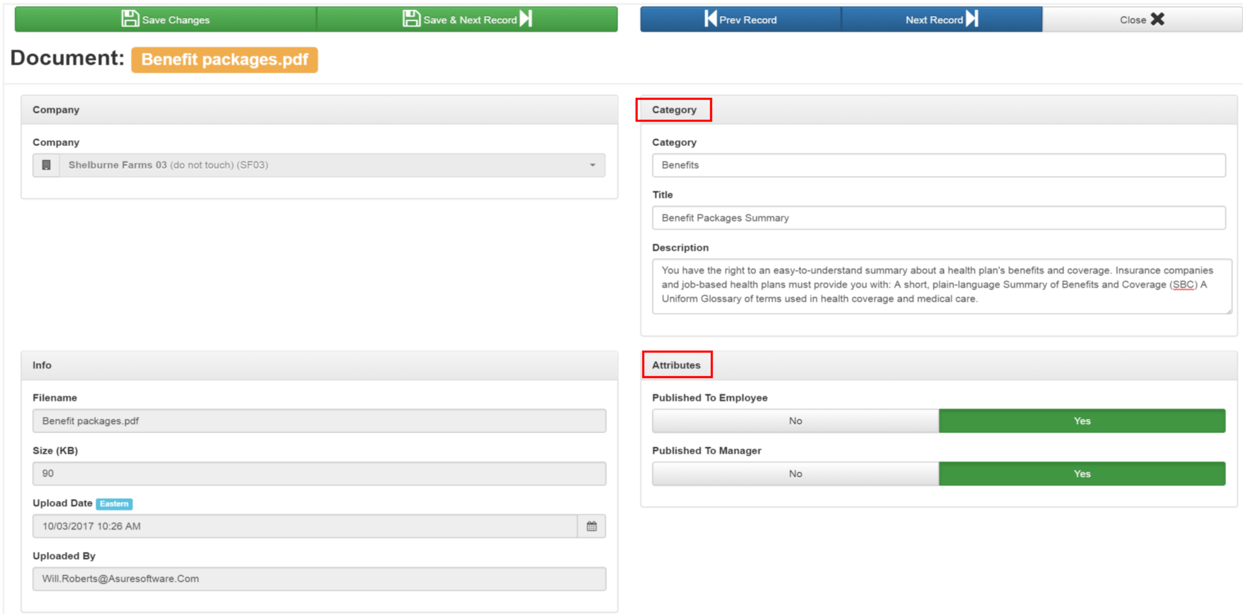
Editable fields include:

Category tile:

- Category
- Title
- Description

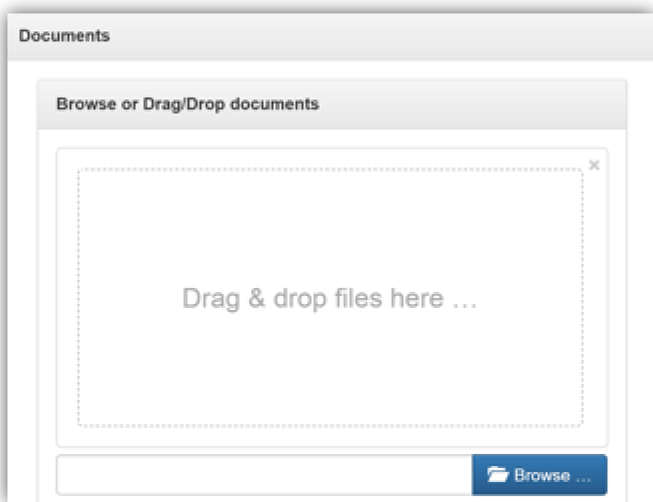
Attributes tile

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



Adding a New Document

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



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.

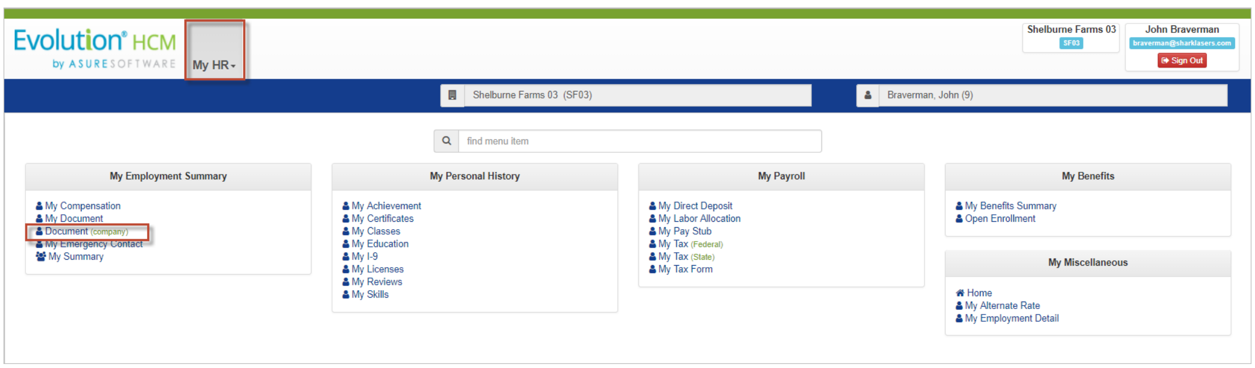
After saving a document, click on the document's summary line to open the dialog box and give your document a **Category**, **Title**, and **Description**. This is also where you can **Publish** the document **to** your **employees**.

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.

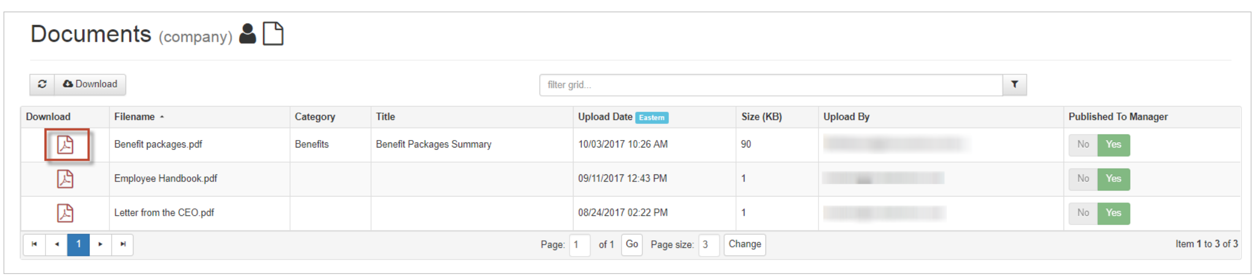
The document is now available for viewing by the employee.

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.



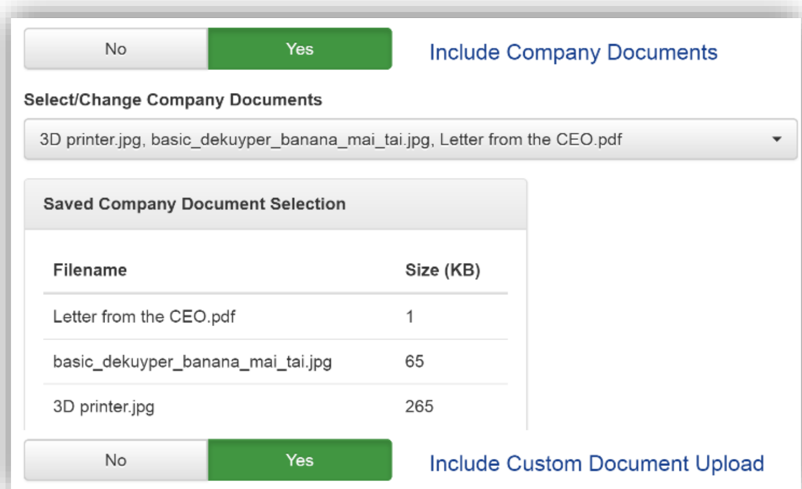
Note that you can share a video via the published Company Documents to the employees. Go to **HR Admin – Company – Company Documents**. Upload your video and move the **Publish to Employee** toggle to **Yes**. When the employee looks at the **My HR – Employment Summary – Document (company)**, the video 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.

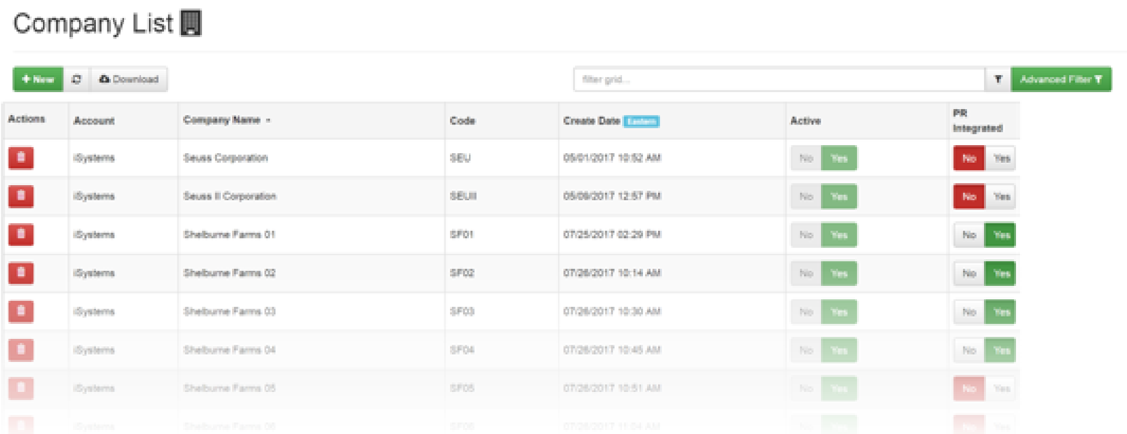
Make sure the **No/Yes** toggle is set to **Yes** for **Include Company Documents**. The dropdown will draw from any company documents that you have uploaded.

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.



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**.

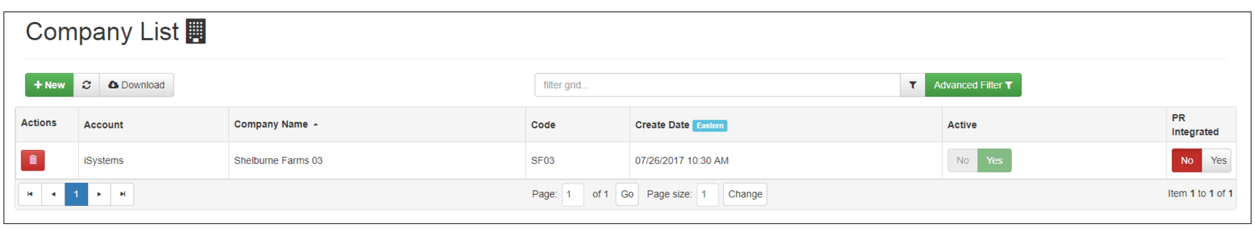
It's important to remember that the number of companies you can view will be dependent on your role:

Number of companies you can view:

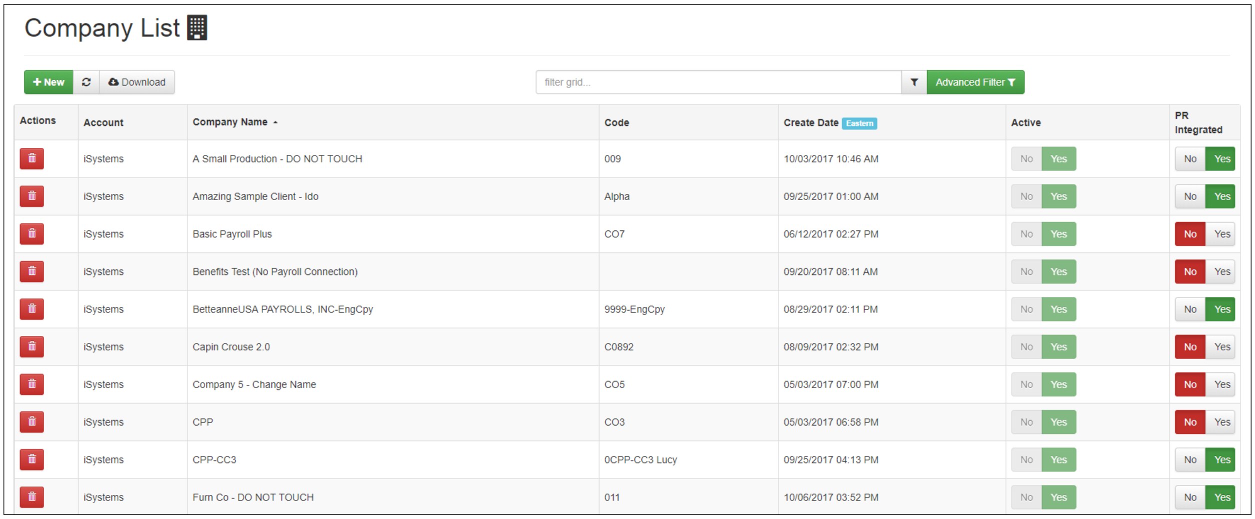
- A **Super Admin**, for example, will have access to all companies that have been cutover for the account
- A **Service Bureau Admin** will only have access to the companies that are assigned to them.
- A **Base Admin** user will only see their own company

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.



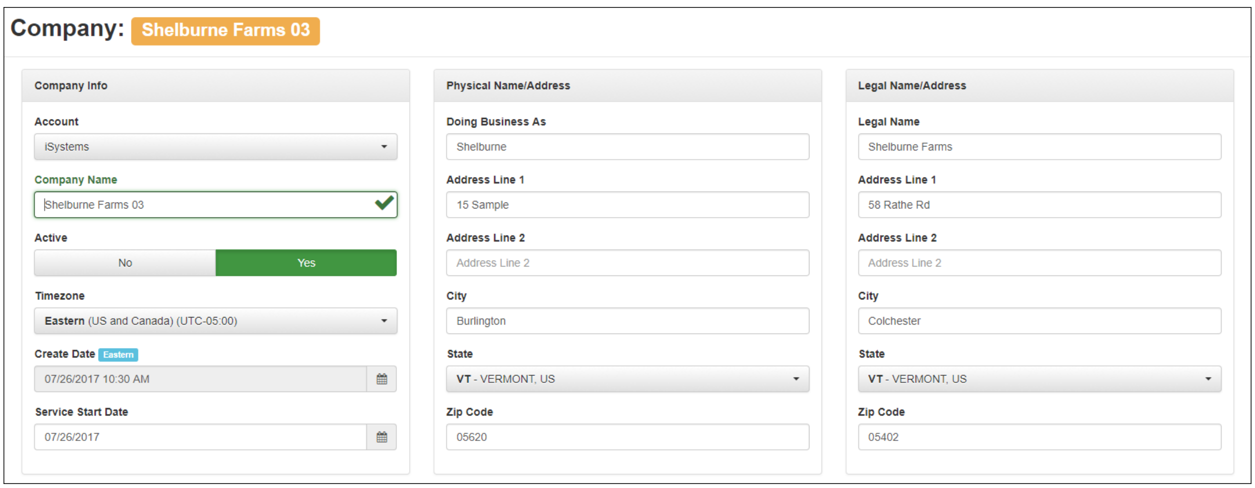
If, however, no company is selected, your view will include all companies:


Company List

+ New | Download | filter grid... | Advanced Filter

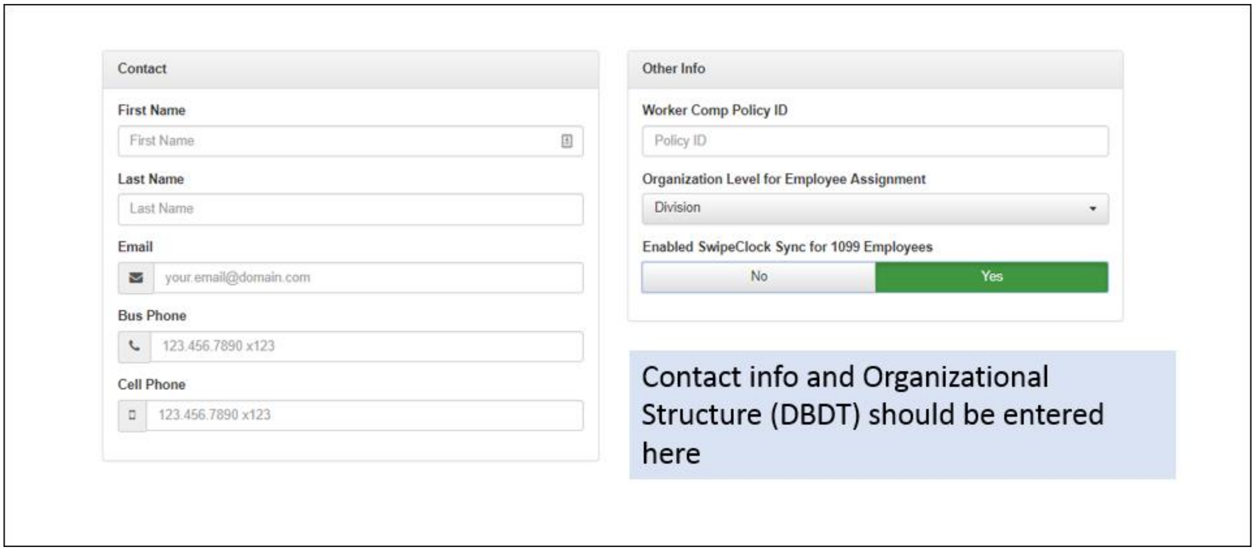
Actions	Account	Company Name	Code	Create Date Eastern	Active	PR Integrated
	iSystems	A Small Production - DO NOT TOUCH	009	10/03/2017 10:46 AM	No Yes	No Yes
	iSystems	Amazing Sample Client - Ido	Alpha	09/25/2017 01:00 AM	No Yes	No Yes
	iSystems	Basic Payroll Plus	CO7	06/12/2017 02:27 PM	No Yes	No Yes
	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	C0892	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

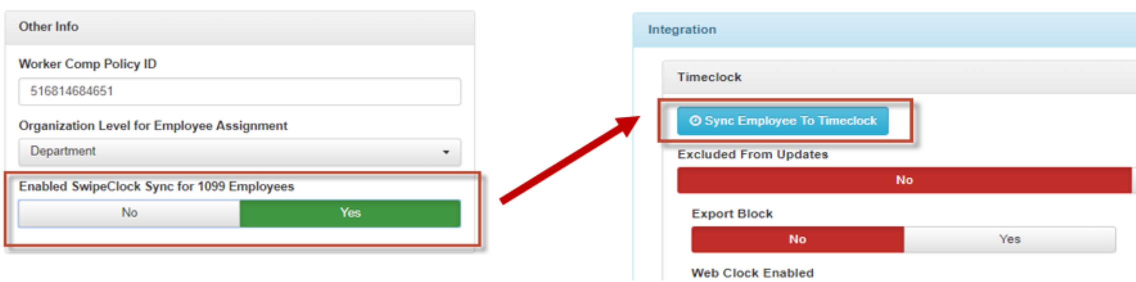
3. Click on the company which you want to work with to open the Company Configuration Settings screen.



When a company is opened, you can view:

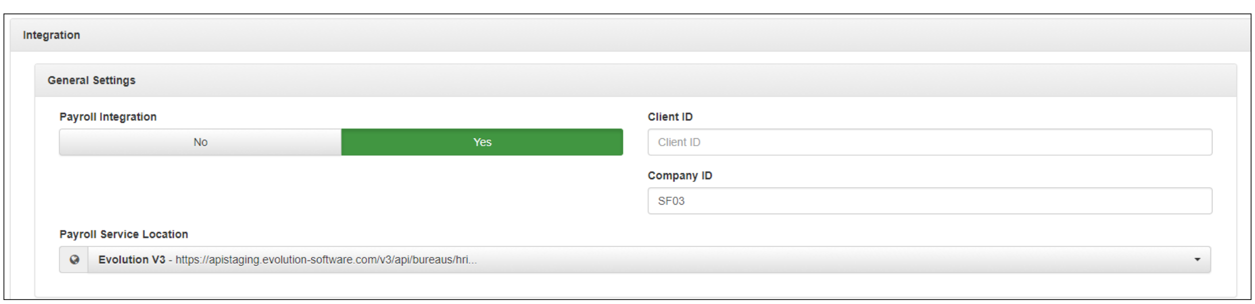
- Address and contact info
- Active or Inactive Status – Use the **No/Yes** toggles to change the status.
- Timezone and Creation date
- Organizational levels (DBDT)
- Payroll integrations. Note the **PR Integrated** column should always be set to **Yes**.

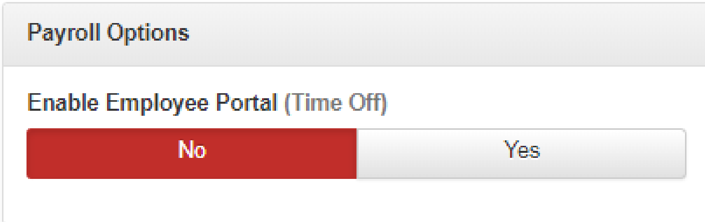




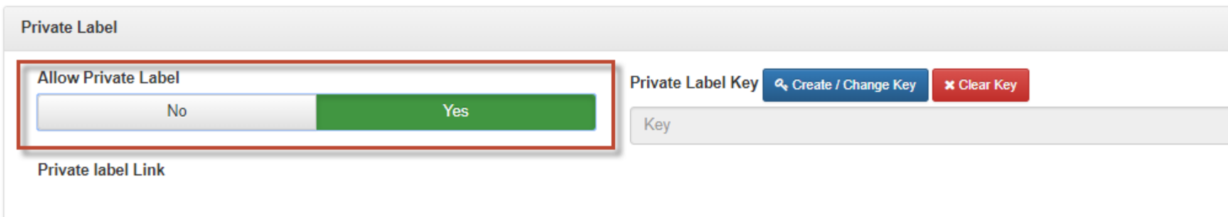
In the **Other Info** section of the **Company List** screen, the **Enabled SwipeClock Sync for 1099 Employees** Yes/No toggle button has been added in order to have a **Sync Employee to Timeclock** button appear on the **Employee Summary** screen.

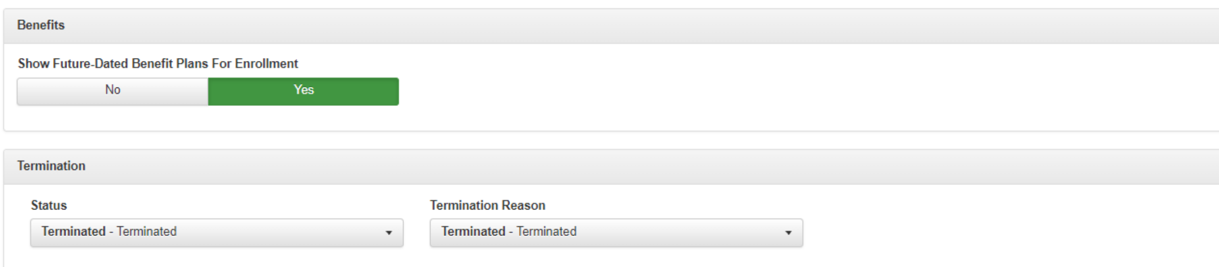
Previously, the **Sync** button only appeared for regular (W-2) employees.



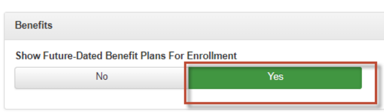


For the Company Logo upload, the **Allow Private Label** toggle should be set to **Yes**.

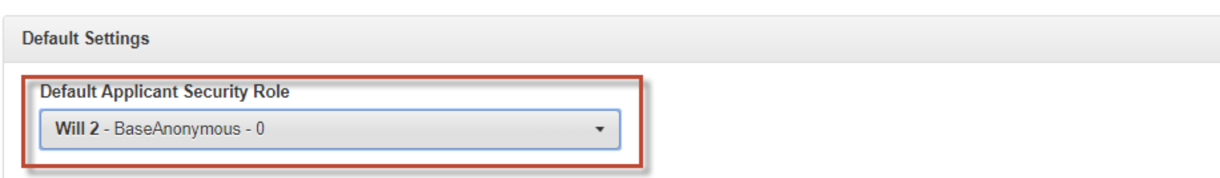




Note: in order for Administrators to be able to help employees enroll in Open Enrollment using the **Employee Benefits** screen, in the **Company List** screen for this company, in the **Benefits** section, the **Show Future-Dated Benefit Plans for Enrollment** field toggle must be set to **Yes.**

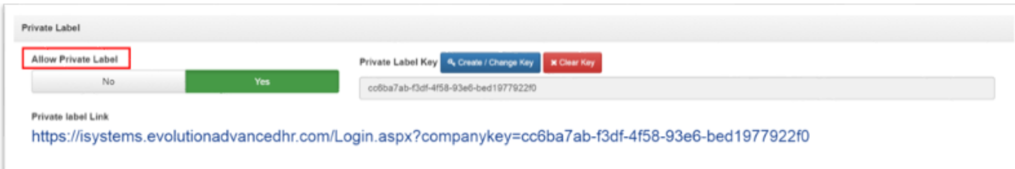


Default Applicant Security Role must be set to **Base Anonymous Role**.



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

Company Logo Upload

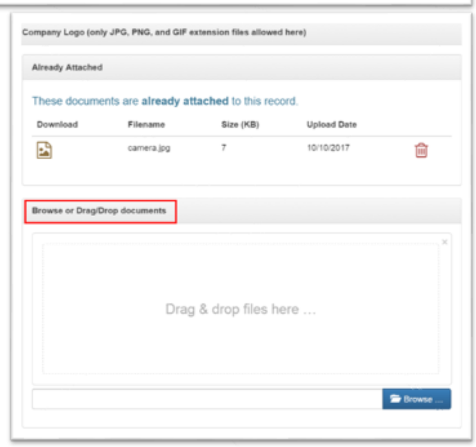


Company Logo Upload:

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

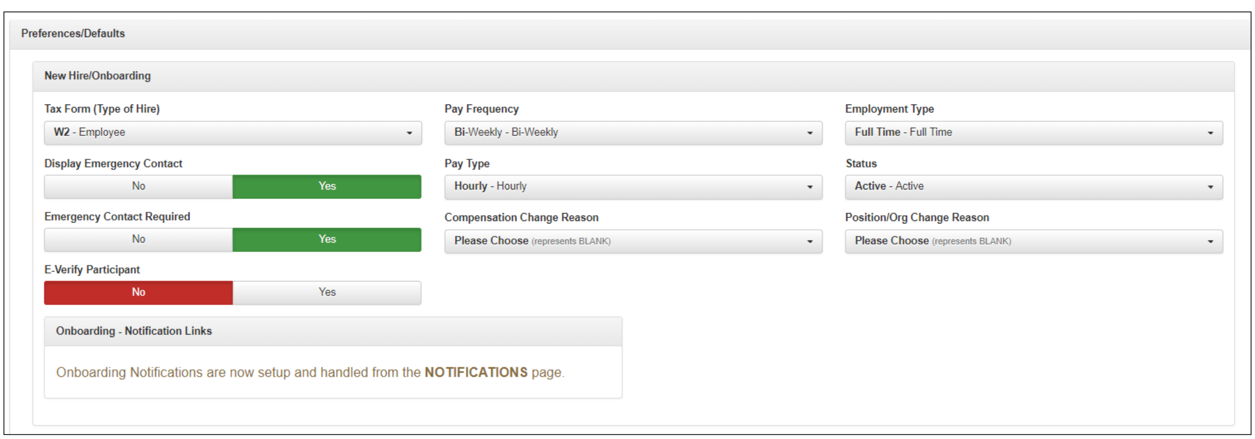
Drag and drop files, or **browse** your computer.

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



Preferences/Defaults section

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



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

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

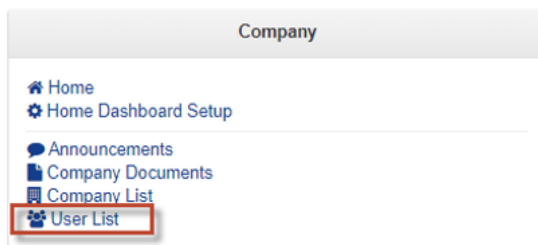
Field / Button	Description
Emergency Contact Required	Select if you want to require an emergency contact for each new hire.
E-Verify Participant	Select if you want to make each new hire an E-Verify participant.

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.

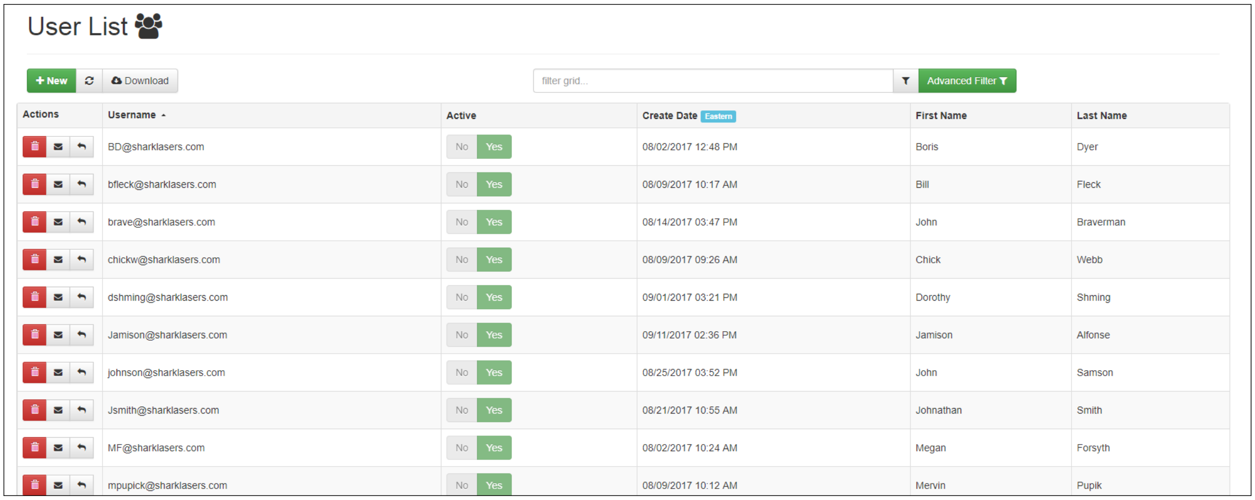
> To view a list of all the screens in the system, or just the ones associated with a particular company, go to **HR Admin – Company – User List**.

> 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**.



Actions	Username	Active	Create Date Eastern	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

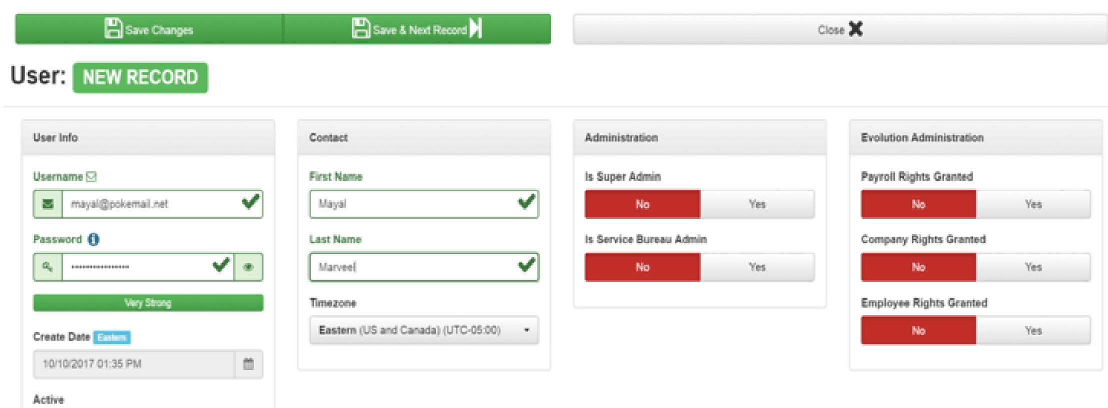
User List Dashboard screen

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)



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.

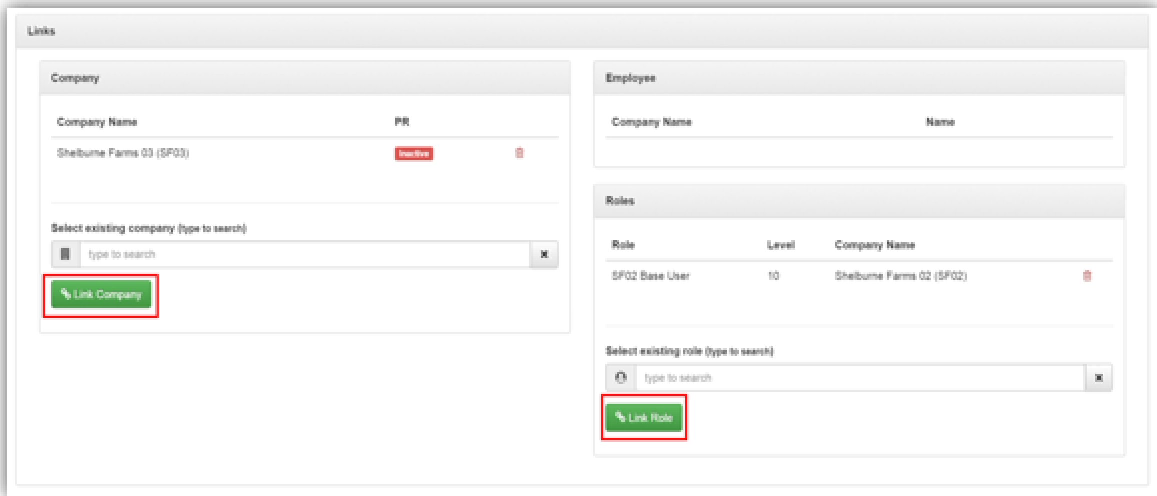
Clicking on the **Username** will open up a detail of their information. **Linked Companies** and **Security Roles** can be viewed and/or edited. The **User List** screen is also where you can do the following tasks:

- 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.

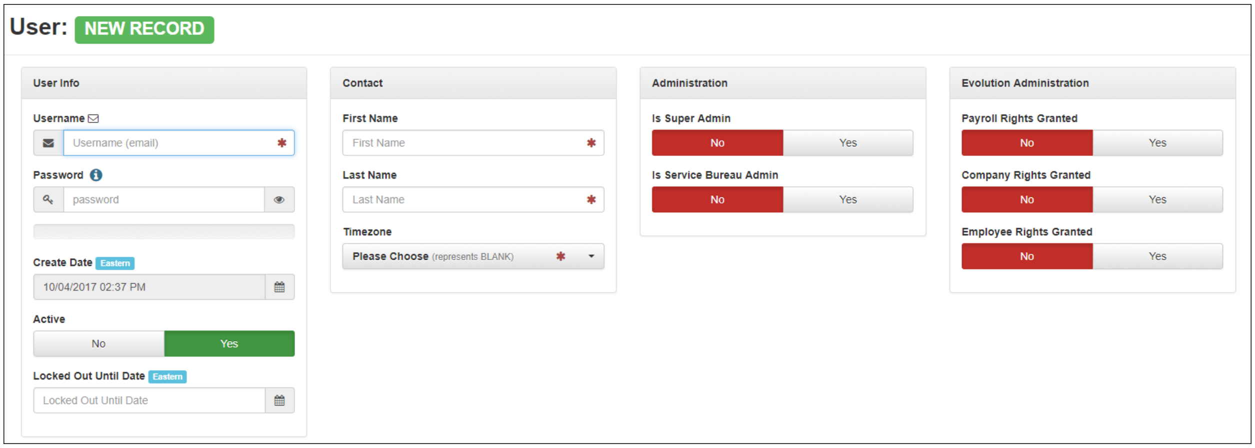
You can also create custom Roles with specific security settings.

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.



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.

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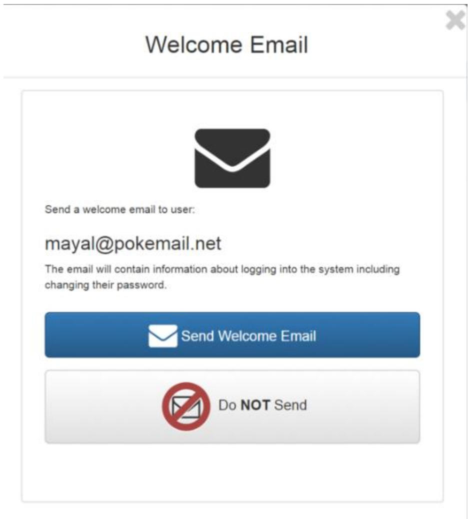
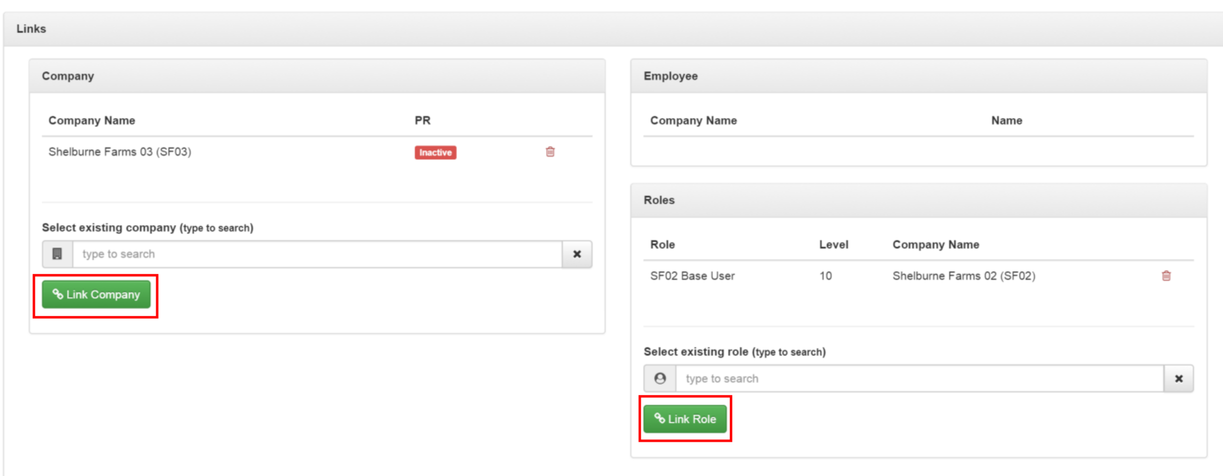
4. Click **Save Changes**. A Welcome Email popup will appear giving you the option to send an email with login instructions.



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).

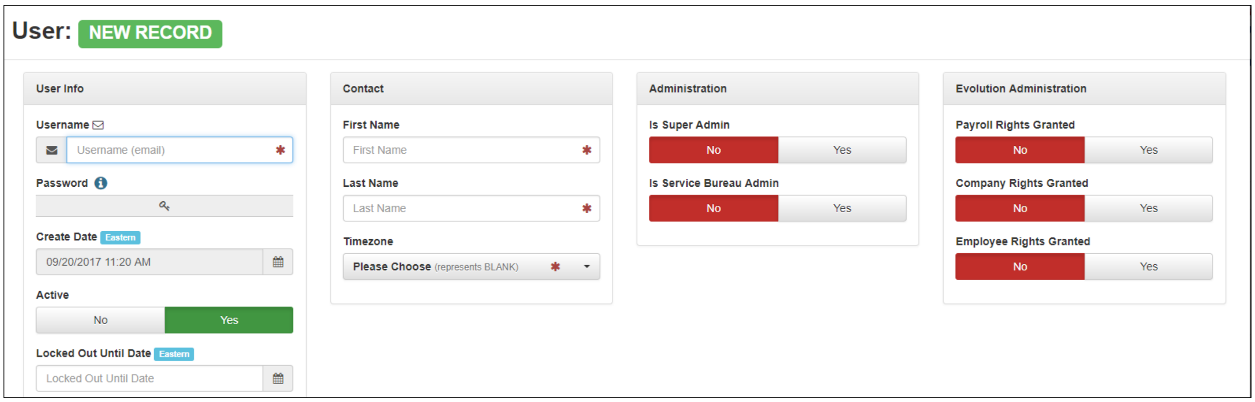


Note: A user's access is tied to their **Security Role(s)**. If the user is a Super Admin or Service Bureau Admin, they generally won't be tied to a company-level role. If, on the other hand, they are an employee of a company, they must have a company-level security role.

Creating Service Bureau Admins and Assigning them Clients

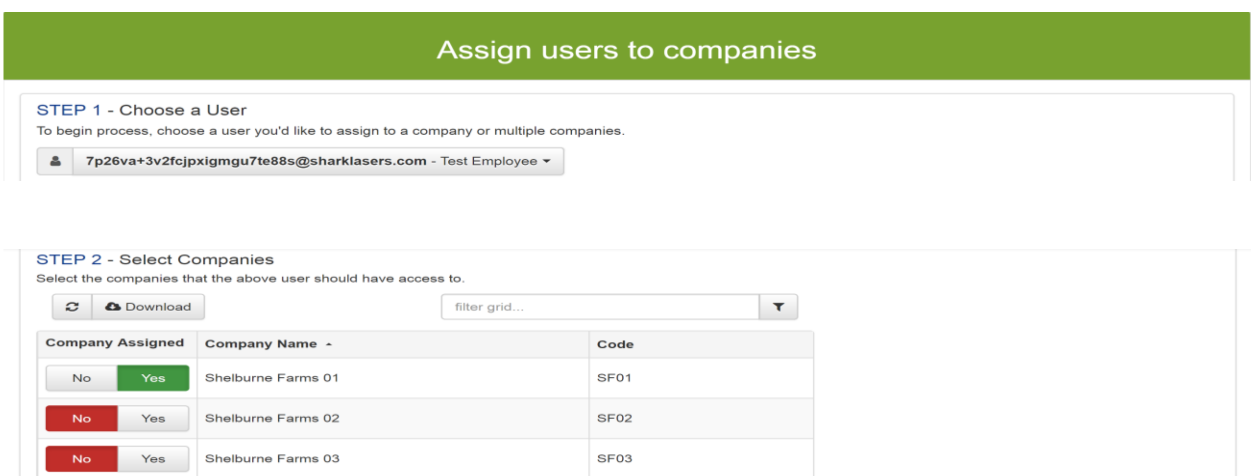
Use the following steps to create Users with a Security Role of **SB Admin**:

- 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**.



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.



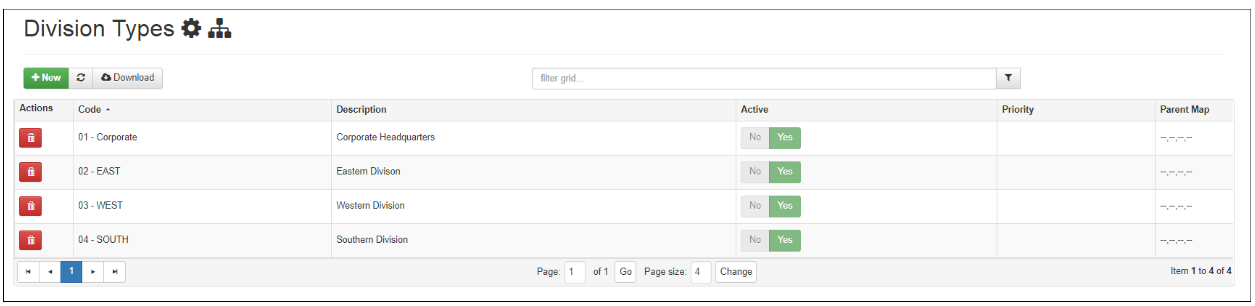
Company Structure Menu

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.

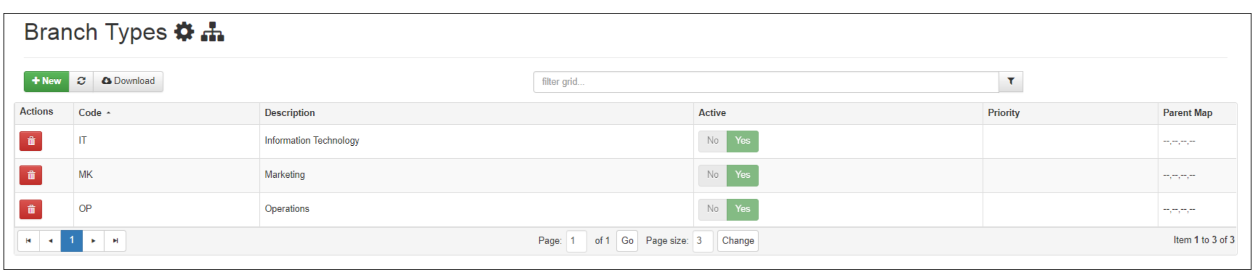

Division Types

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

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

Branch

Displays the Branch Types set up for this company.

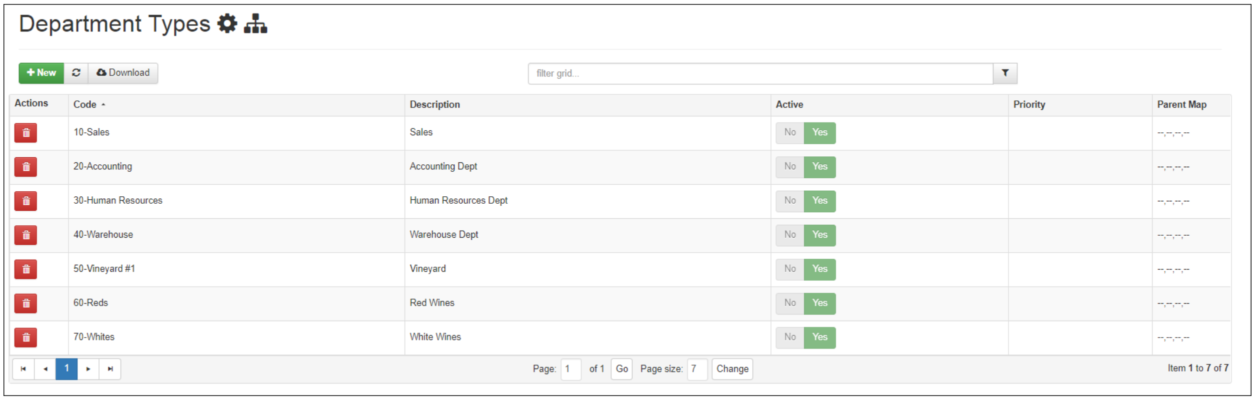

Branch Types

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

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

Department

Displays the Department Types set up for this company.

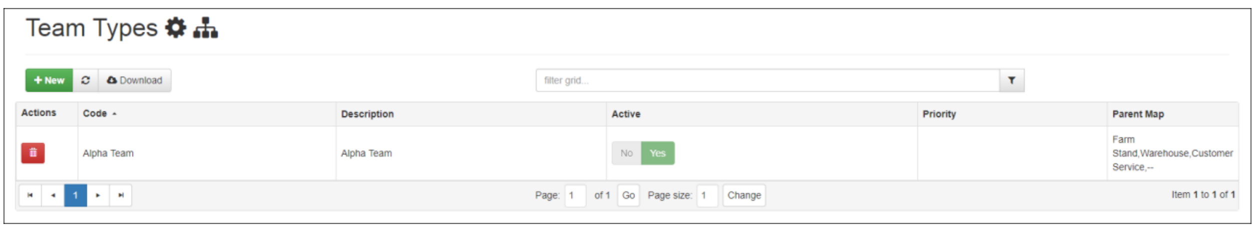

Department Types

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		--,--,--,--

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

Team

Displays the Team Types set up for this company.


Team Types

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

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

Reporting Menu

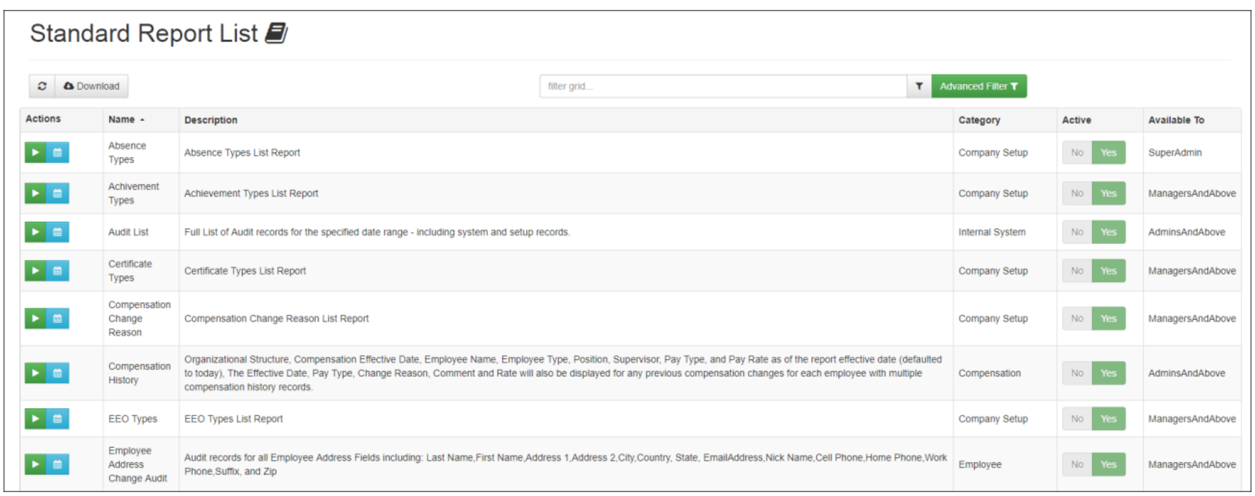
There are two ways to run reports in Advanced HR 2.0. You can run **Standard Reports**, or create Custom Reports (using **Quick Report Writer**). The system comes with dozens of Standard Reports out of the box. These reports cover everything from Absentee Lists, New Hire Lists, to Workers Comp Types.

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.



Standard Report List

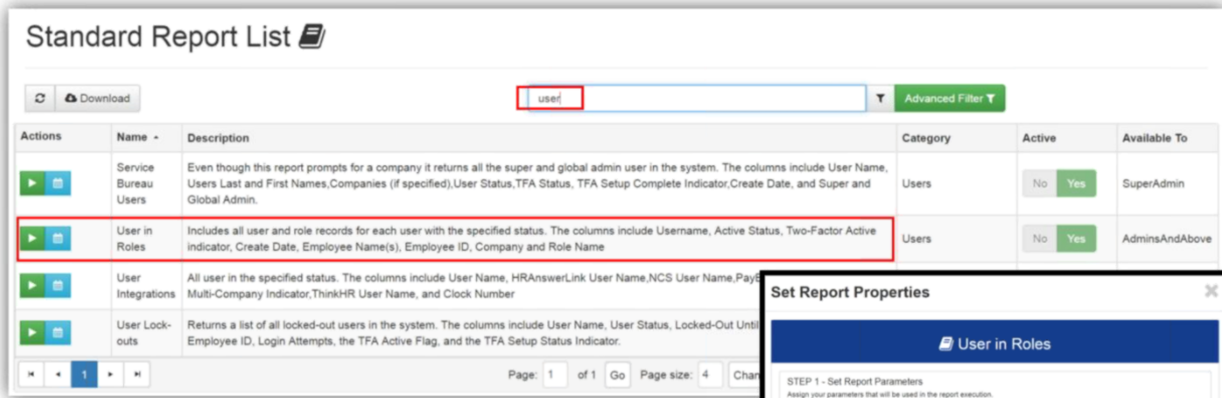
Download | filter grid... | Advanced Filter

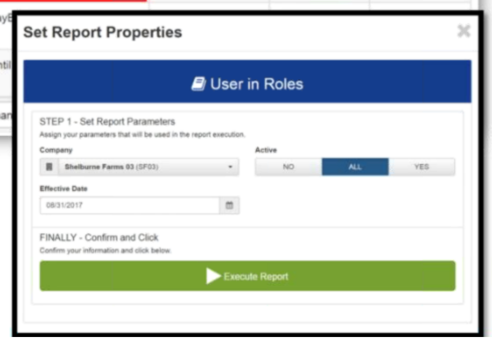
Actions	Name	Description	Category	Active	Available To
	Absence Types	Absence Types List Report	Company Setup	No Yes	SuperAdmin
	Achivement Types	Achievement Types List Report	Company Setup	No Yes	ManagersAndAbove
	Audit List	Full List of Audit records for the specified date range - including system and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

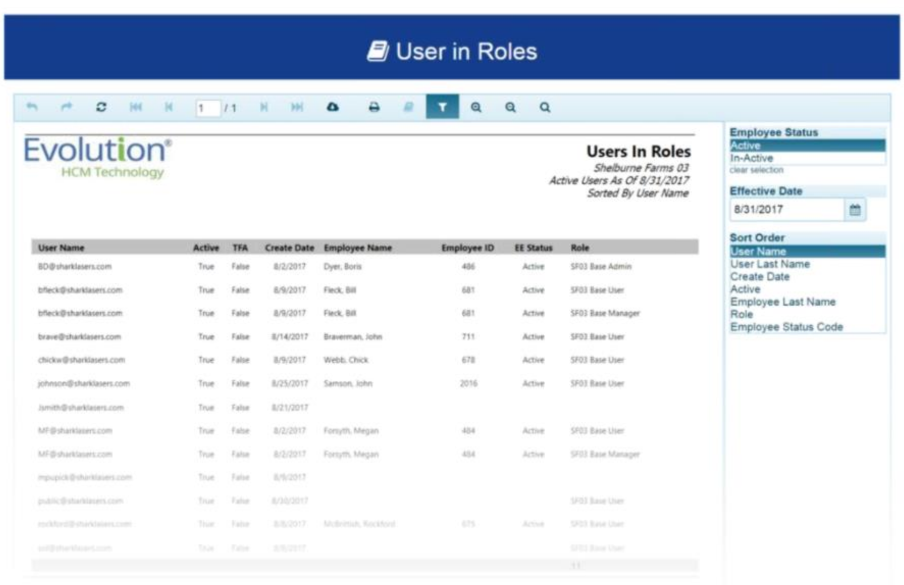
Notice that you see the **Name**, **Description**, **Category**, **Active Status**, and who the report is **Available To**.

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





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

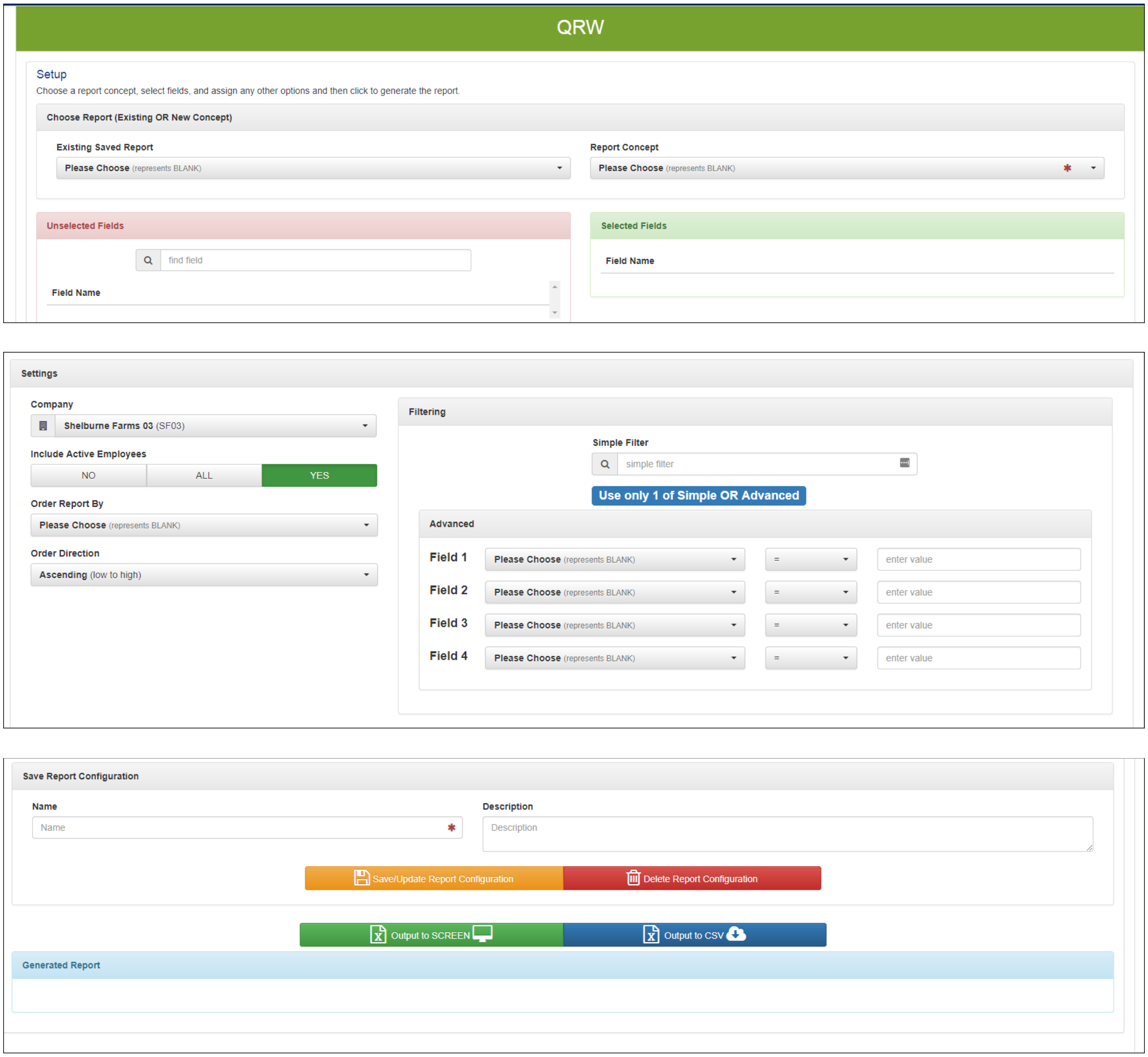


The Users in Roles Report will be generated.

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

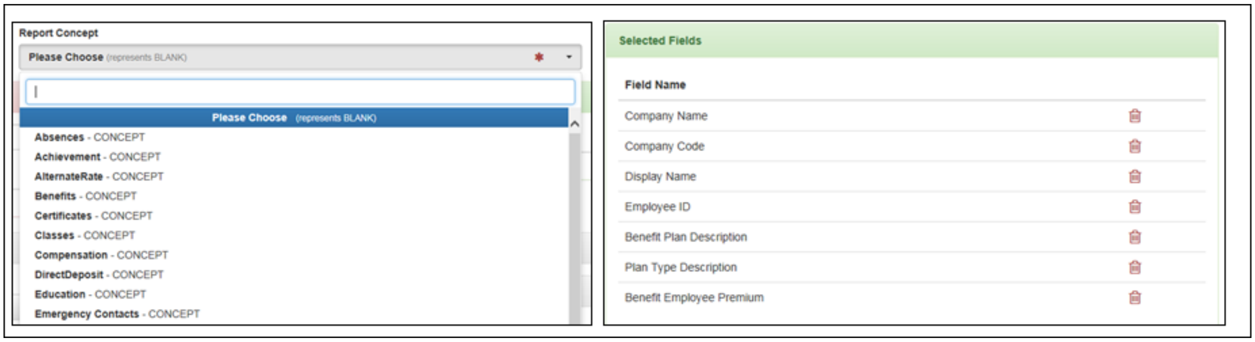
Quick Report Writer (QRW)

The Quick Report Writer (QRW) allows you to create custom reports on data within Advanced HR.

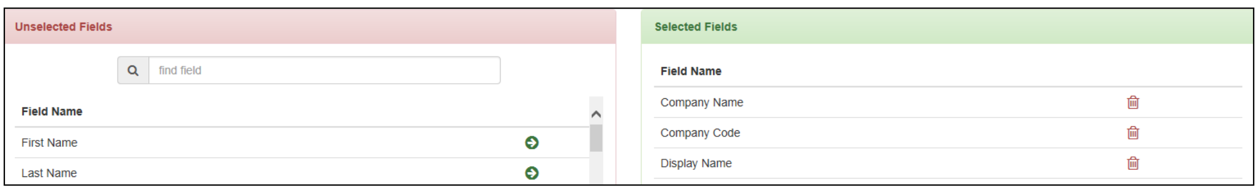


Quick Report Writer (QRW) screen

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.



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.



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

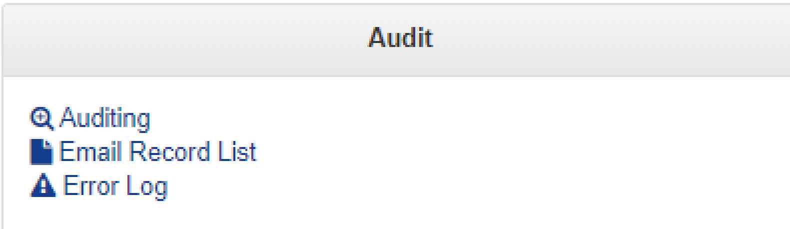
1. Selecting which companies you are reporting on if you have more than one
2. Reporting on only inactive employees (NO), all employees (ALL), or only active employees (YES)
3. Which field you want the report to sort on and in what direction (ascending or descending).

Tip:

Make sure that for all users, in their Browser's settings, that pop-ups are allowed. Some Brower'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

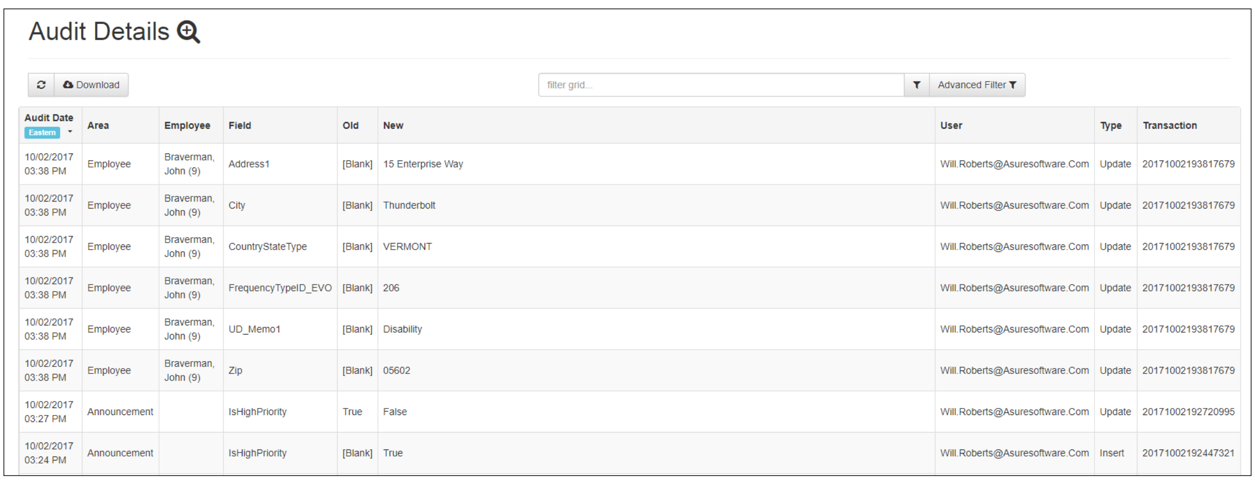
The **Audit** sub-menu on the **HR Admin** page lets you select from the following menu items:



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).

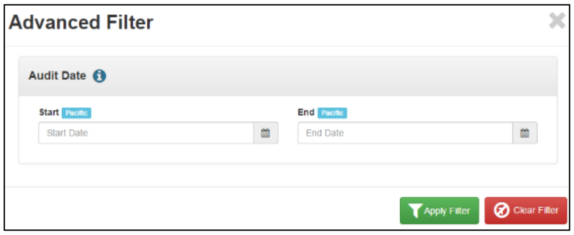
This level of detail combined with the filter grids make searching for specific changes simple. You can connect multiple search criteria with a "+" sign.



Audit Date Eastern	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

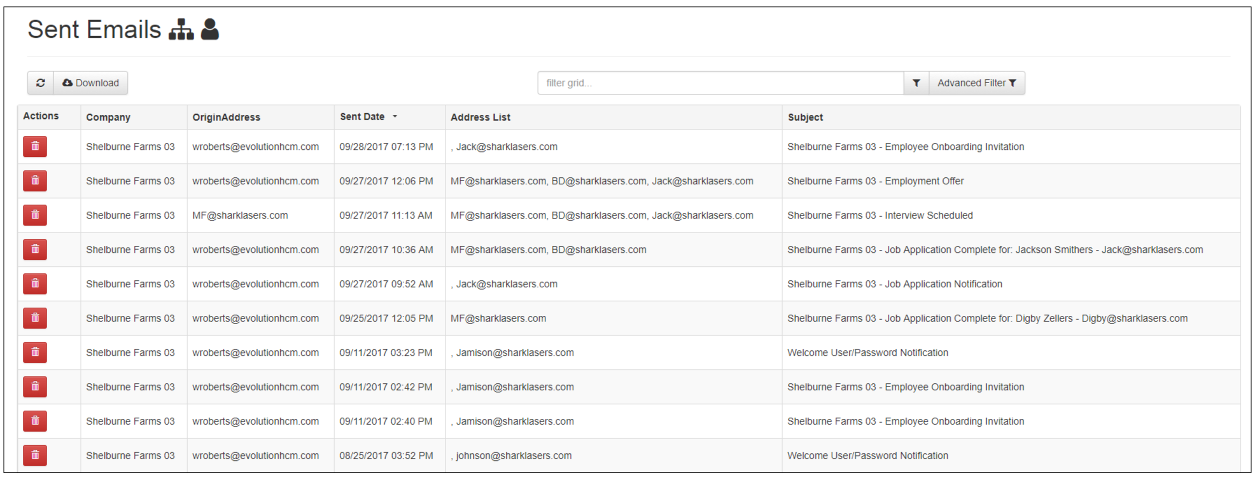
Audit Details screen

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



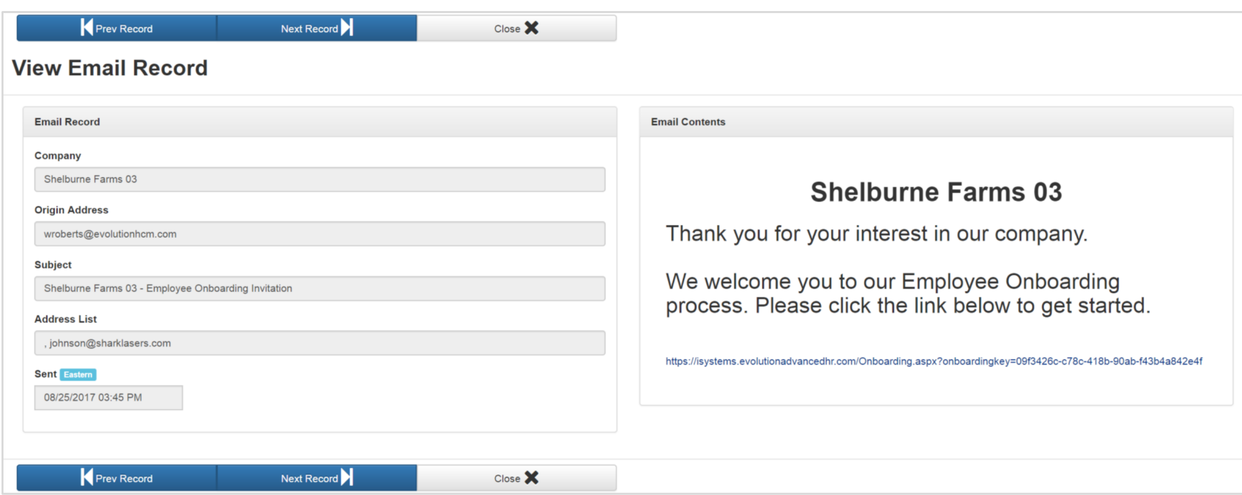
Email Record List

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.



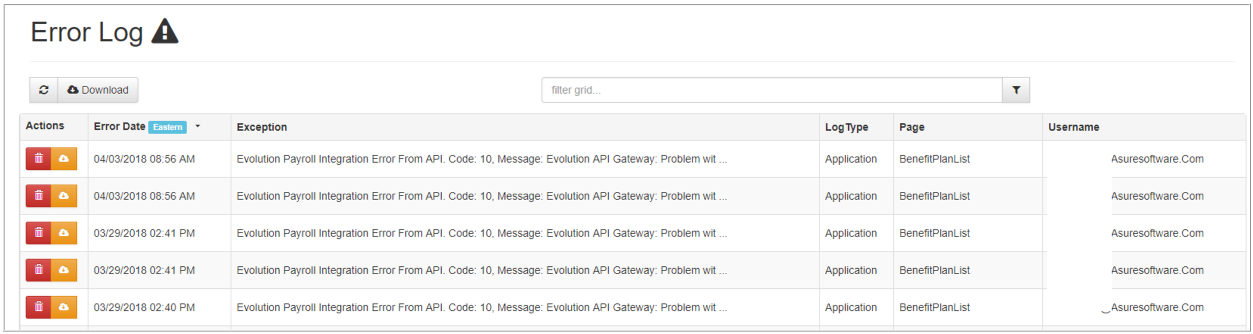
Actions	Company	OriginAddress	Sent Date	Address List	Subject
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/28/2017 07:13 PM	, Jack@sharklasers.com	Shelburne Farms 03 - Employee Onboarding Invitation
	Shelburne Farms 03	wroberts@evolutionhcm.com	09/27/2017 12:06 PM	MF@sharklasers.com, BD@sharklasers.com, 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.

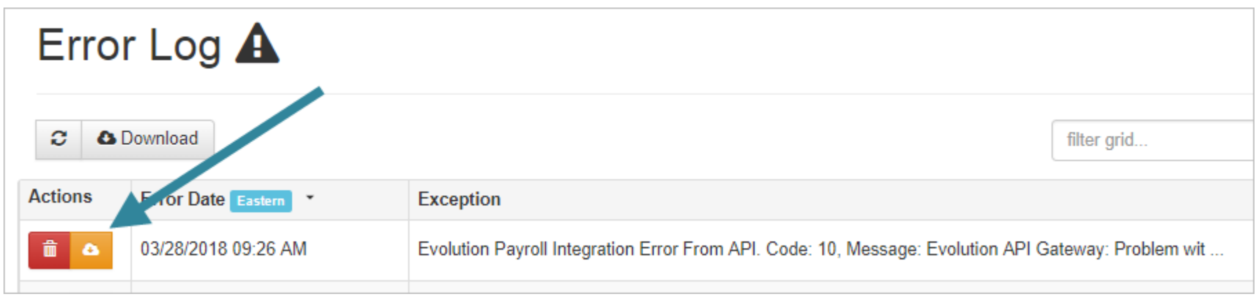


Error Log

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.

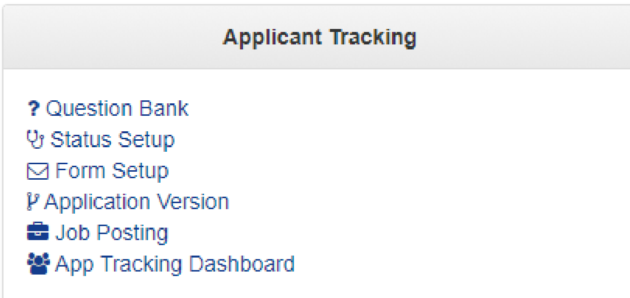


The **Download this Record** button has been added to the Error Log Dashboard for each error log (row) on the screen so that the user can easily download it as a text file instead of copying and pasting from the Error Log details screen.



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.

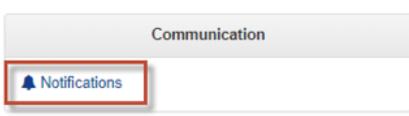
Communications Menu

The **Communications** menu contains the **Notifications** menu item.

Notifications Feature

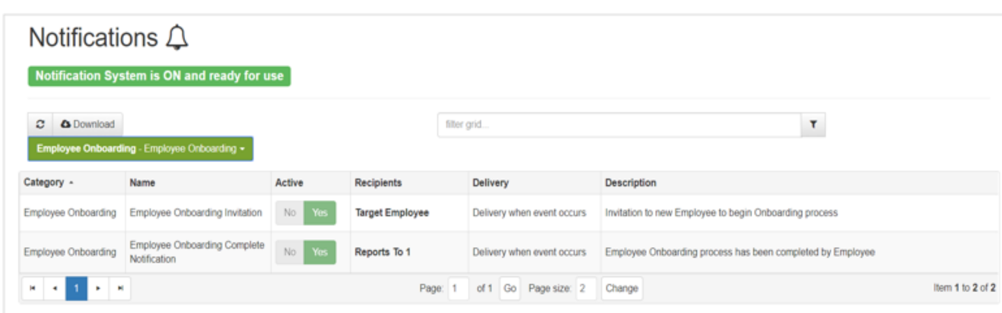
Notification functionality enables you to send email messages to designated recipients. Receiving automatic notifications regarding their employees is a time saver for managers and administrators. Advanced HR 2.0 comes equipped with a full set of event-based and date-based notifications.

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



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

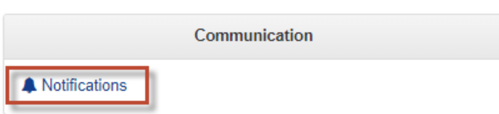
All notifications come with templates that include generic wording with some logic built in. However, you can edit them with company-specific wording and logic. Depending on the Notification, you can choose the recipients to be included:

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

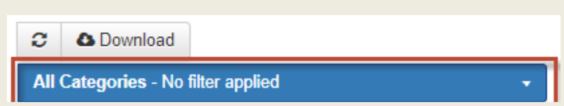
You can set any Notification to be **Active** or **Inactive**. To access and or edit Notifications, the user must have the role of **Base Admin** or higher.

Event-Based Notifications

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



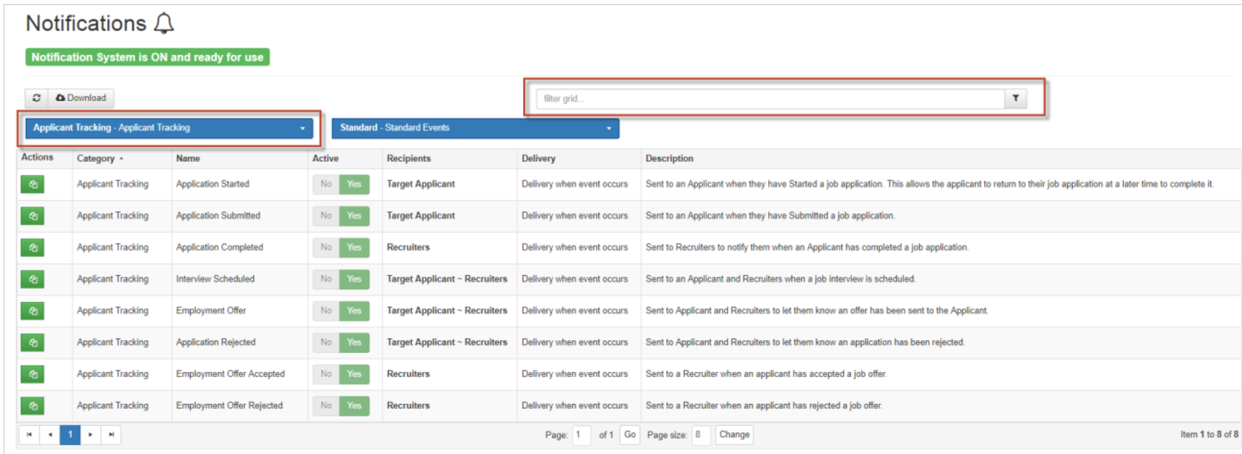
Use the blue Notification **Categories** dropdown in the upper-left to select particular categories of notifications that you'd like to display. The default is **All Categories**.



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.

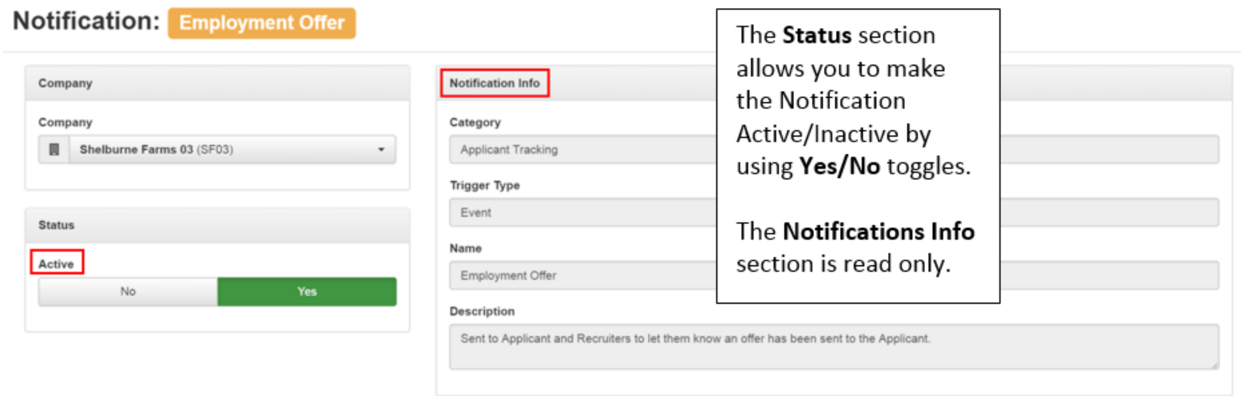


You can use the **Filter Grid** at the top-center of the screen to search for a particular Notification. In addition, you can use the blue **Notification Categories** dropdown in the upper-left corner to select particular categories of Notifications that you'd like to display. Of course, the user can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

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

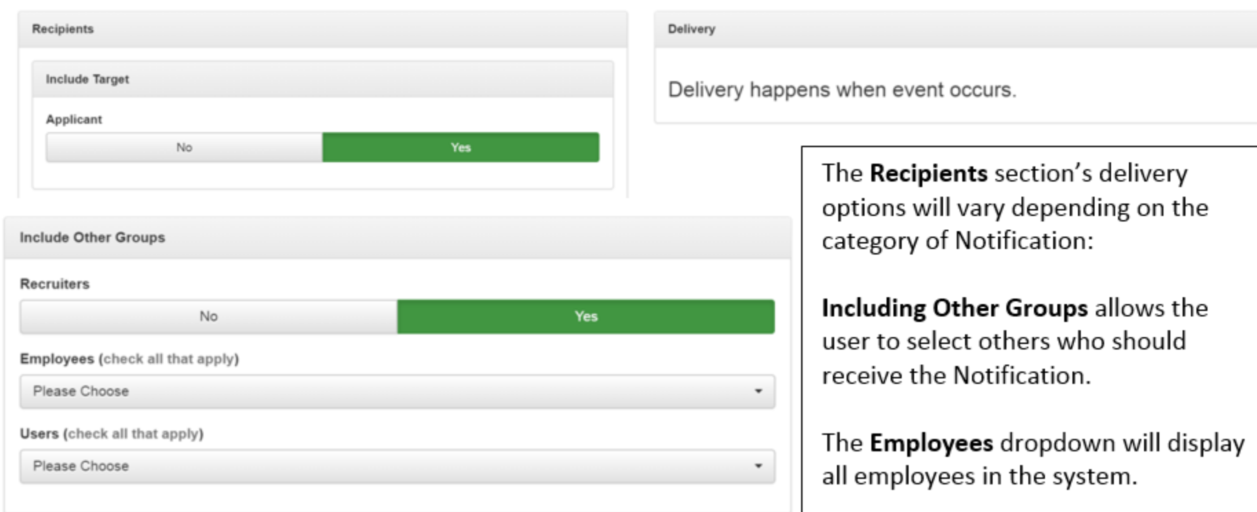
Column Field	Description
Category	The category for the notification, for example: **Applicant Tracking**, **User**, **Classes**, **Direct Deposit**, **Open Enrollment**, etc.
Name	The name of the notification.
Active	The **Yes/No** toggles indicate if the notification is **Active** or not.
Recipients	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.



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

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



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

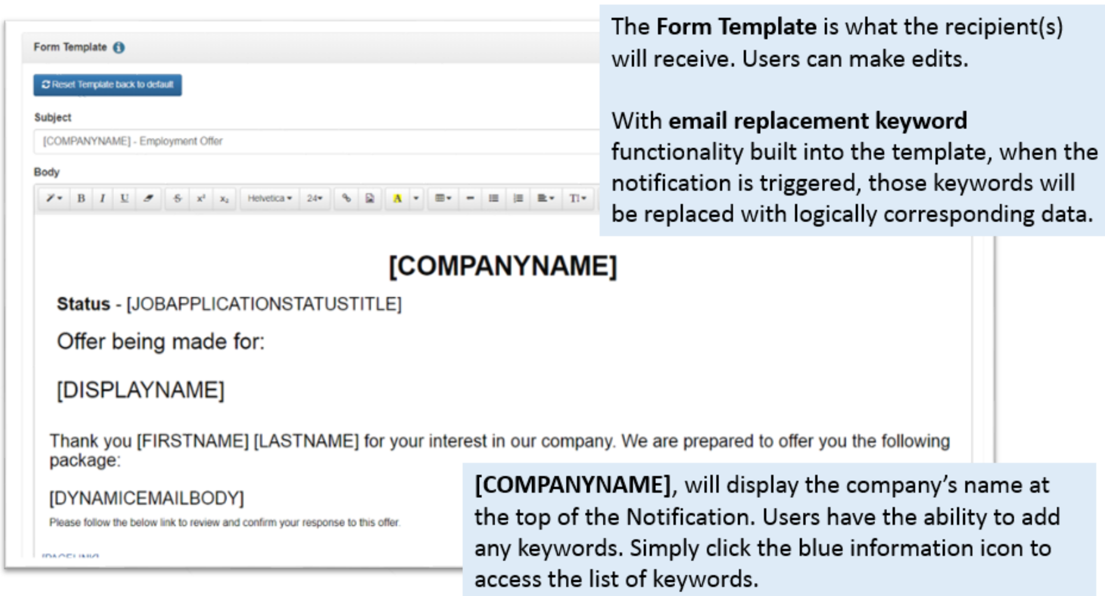
Including Other Groups allows the user to select others who should receive the Notification.

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

The **Users** dropdown is company specific.

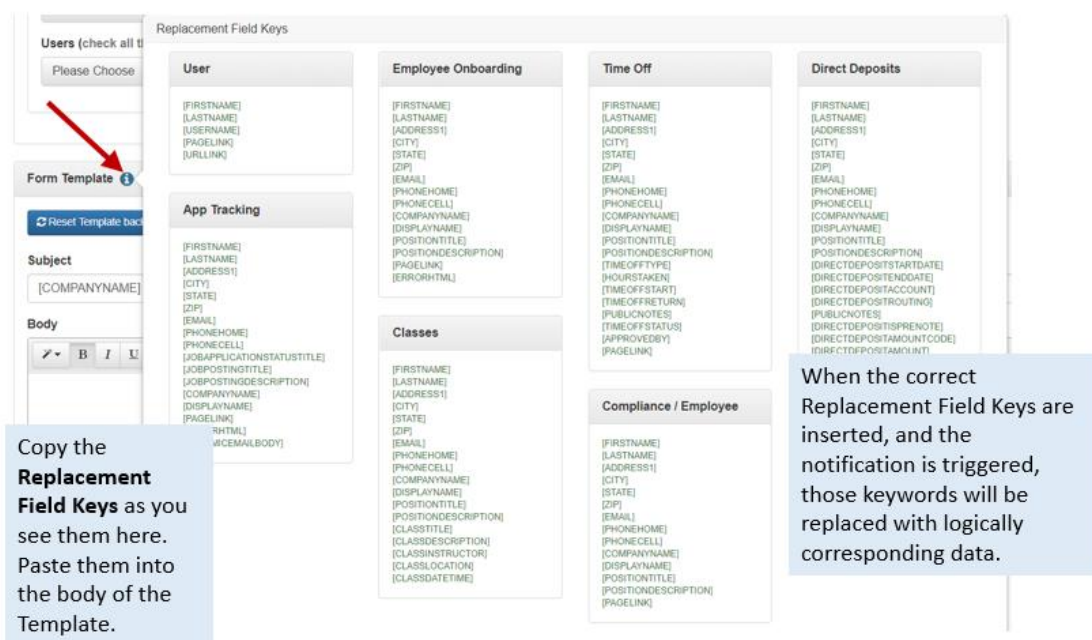
Form Template

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

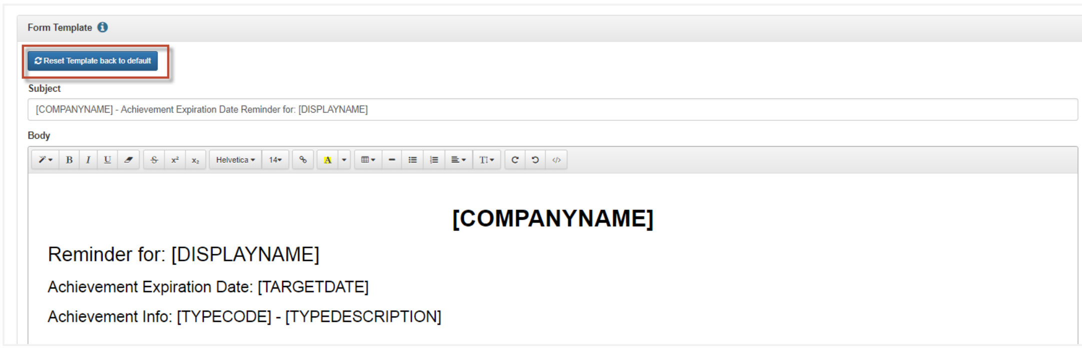


Replacement Field Keys Help

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



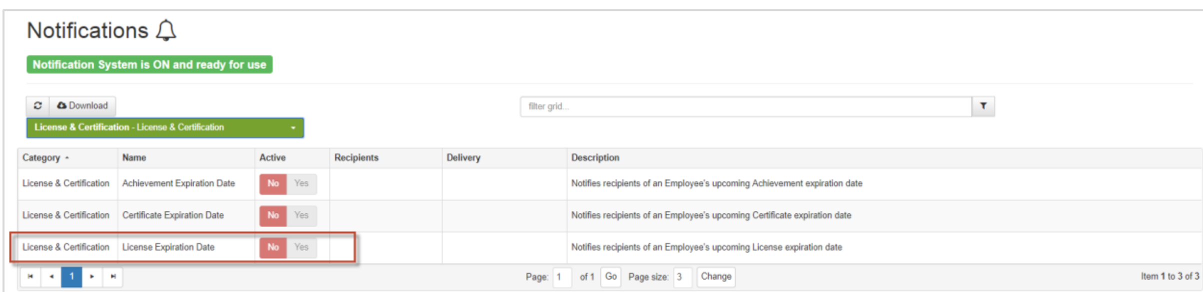
If you make any undesired changes to a Notification, you can reset the template back to its default condition by clicking the **Reset Template back to default** button.



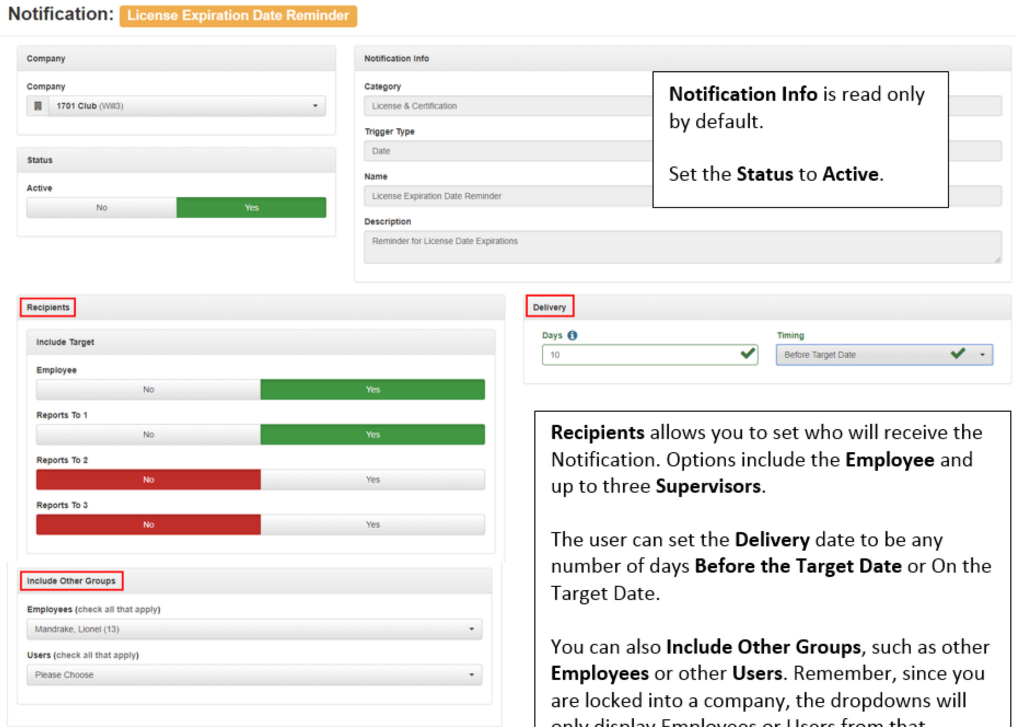
Date-Based Notifications

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

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



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



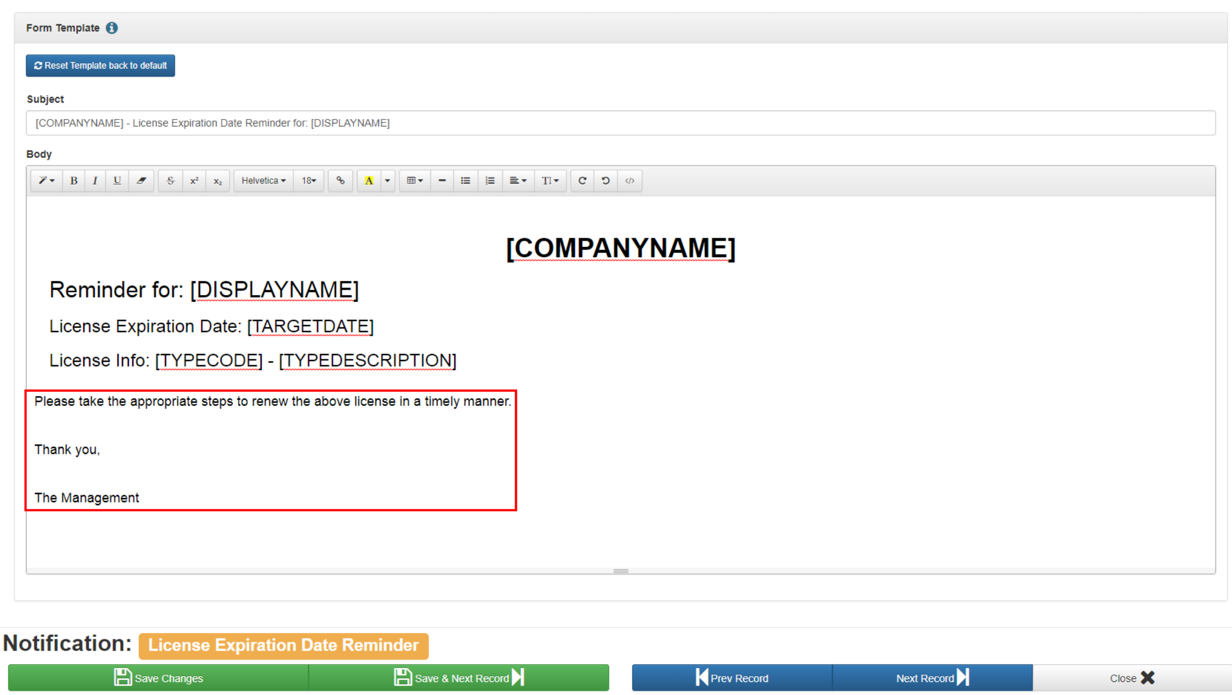
Notification Info is read only by default.

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.



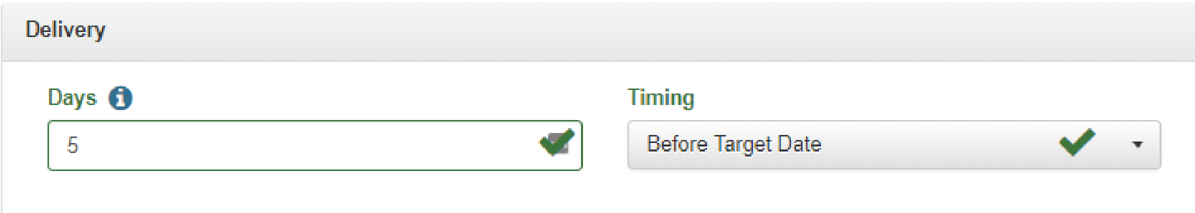
Note the **Form Template** above. As previously discussed, the Form Template is what the recipient(s) will receive. Note that in the above example, we added verbiage to the template. Remember, templates can be edited at any time. In addition, with email replacement keyword functionality built into the 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.

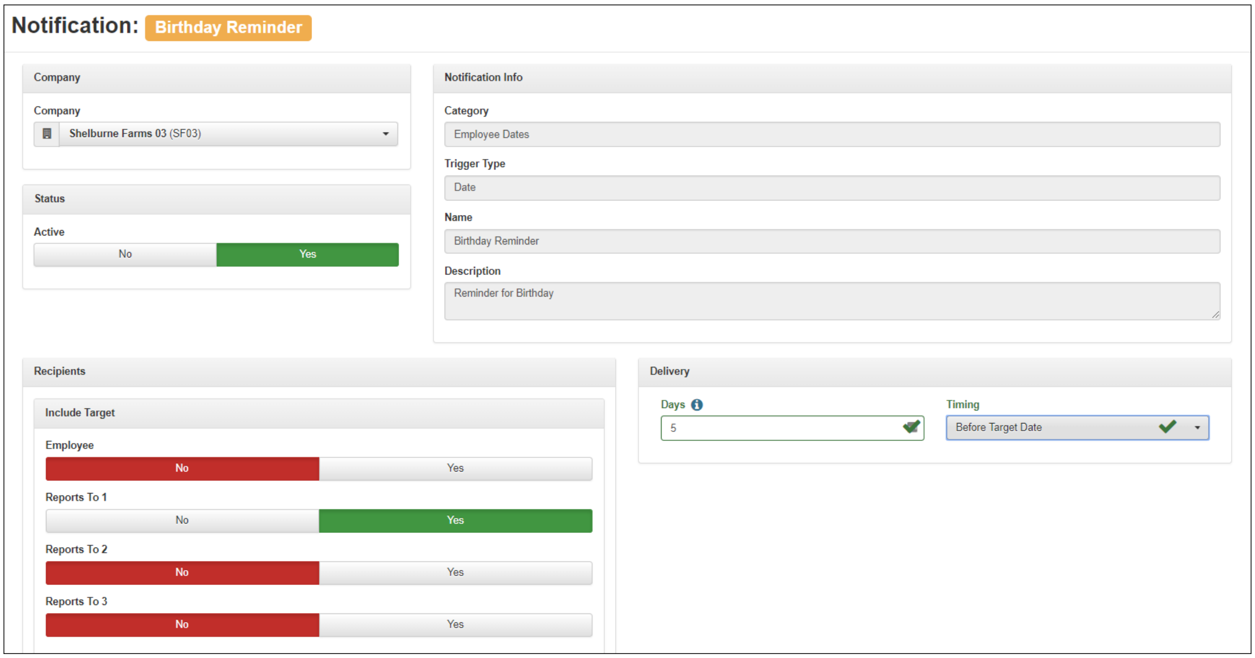
The following table describes all the fields on the Notifications screen when creating a date-based notification.

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: • **Before Target Date** • **On Target Date**

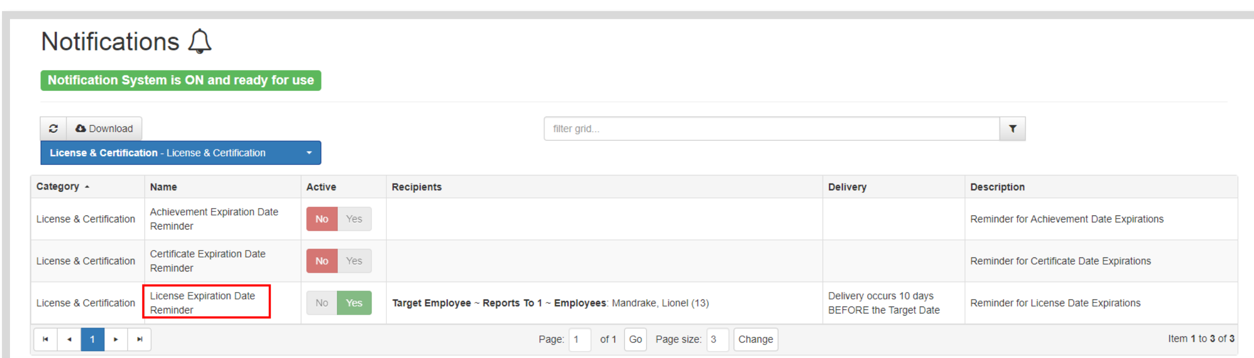
For a Date-Based Notification – for example – Birthdate Reminder – here is an example of setting the **Delivery Days** and the **Timing** fields to create a notification for the employee’s **Reports To 1** supervisor that will appear 5 days Before the Target Date, the employee’s birthday.



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



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



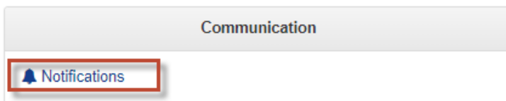
The Notification has now been setup; note the values in the **Recipients** and **Delivery** fields.

Cloning Standard Notifications to Create a Custom Notification

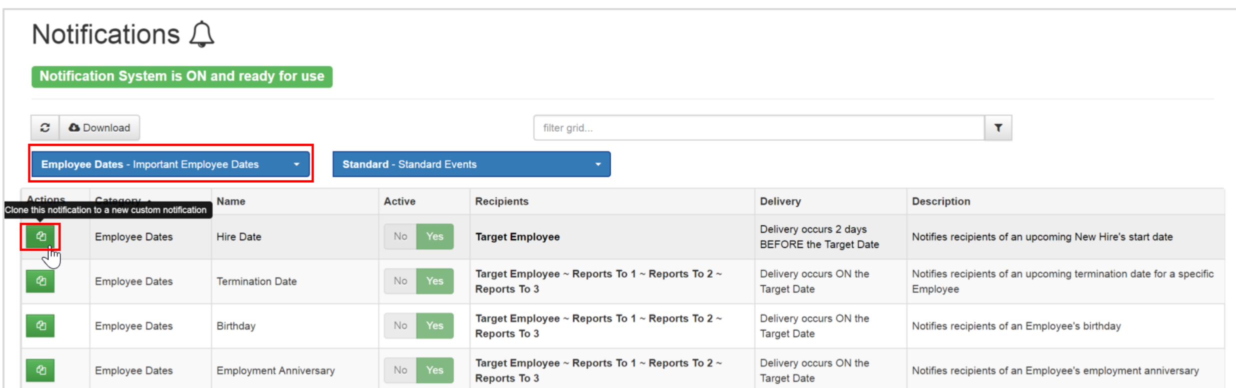
Notifications can be cloned and customized to perform a particular function. For example, Hire Date Notifications typically go to the new employee. However, you can clone this notification and have it go to the new hire's supervisor with specific instructions. To illustrate this example, let's walk through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

To copy a notification to make a custom notification:

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

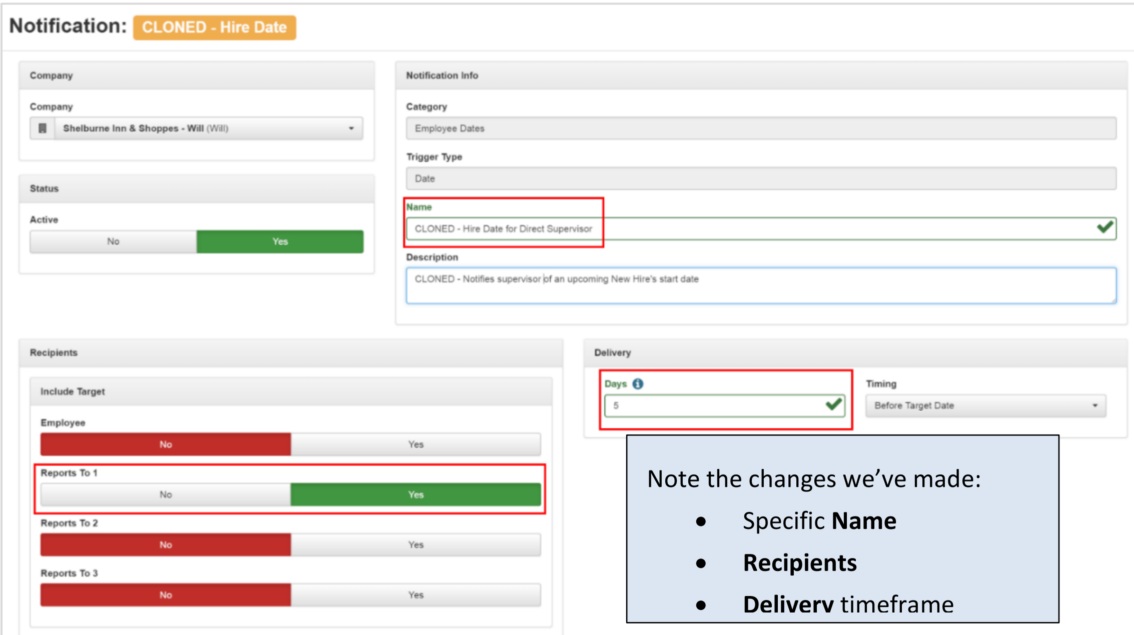


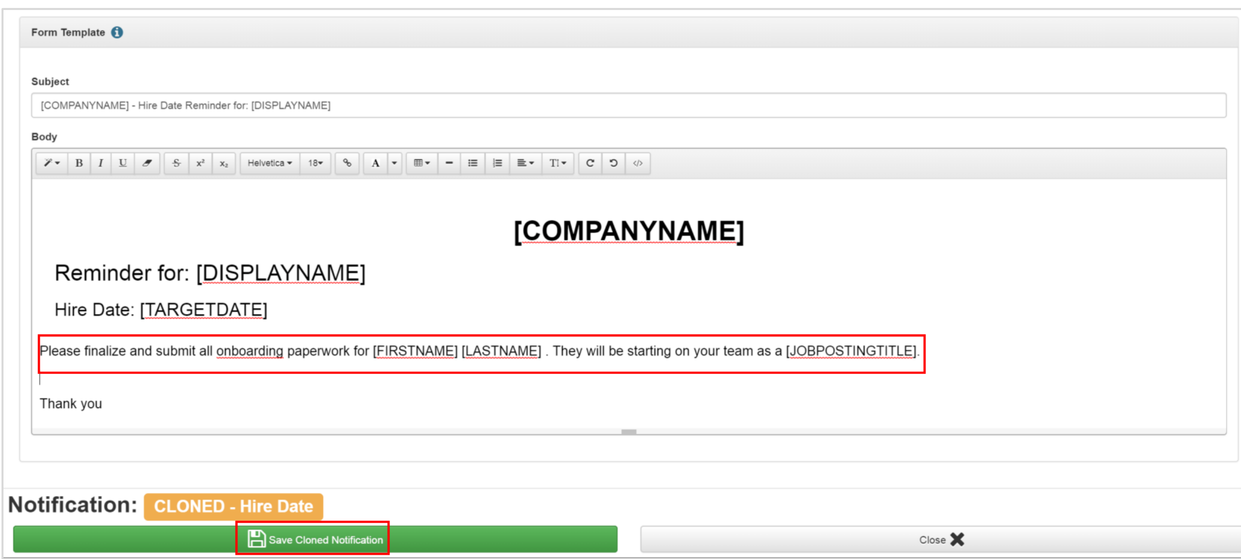
2. The system displays the **Notifications** dashboard. Use the Category dropdown to select the category of the



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

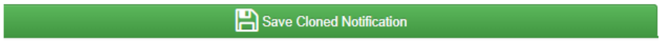
Note that the system displays “CLONED” in the **Name** and **Description** fields.





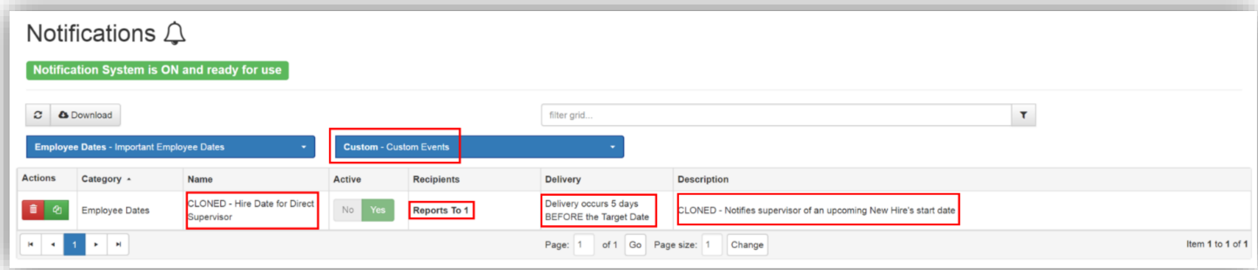
The above example shows the edited notification that will be received by the new hire’s direct supervisor. Note the specific instructions with corresponding keyword logic.

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



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

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



In the above example, this notification reflects our edits. It will be 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.

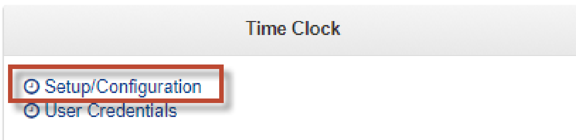
Time Clock Integration

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

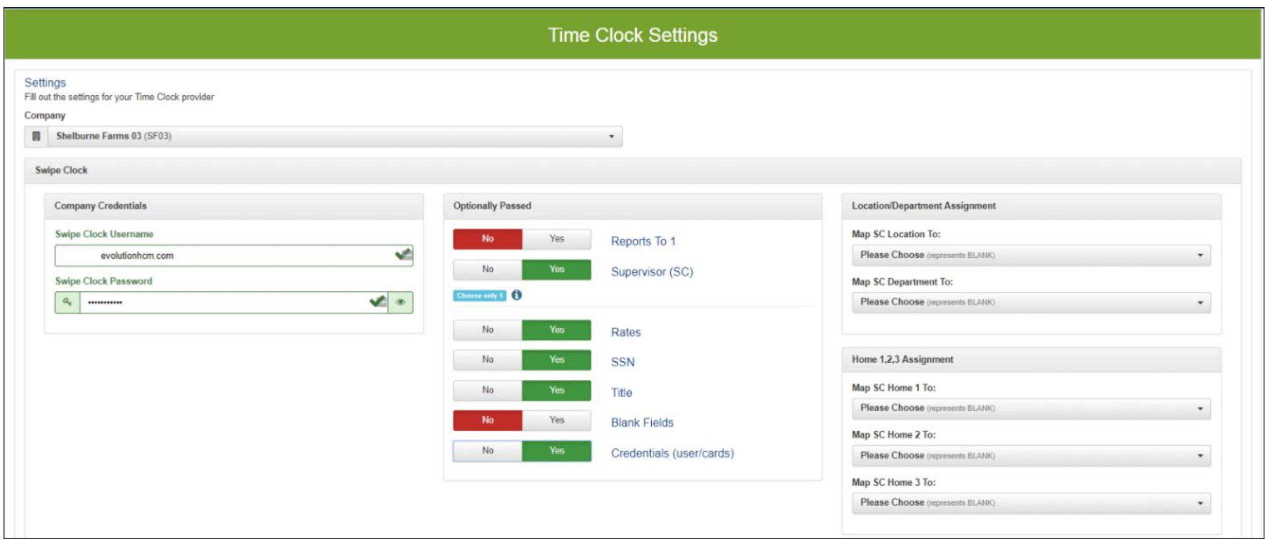
Setting Up the SwipeClock Configuration

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

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



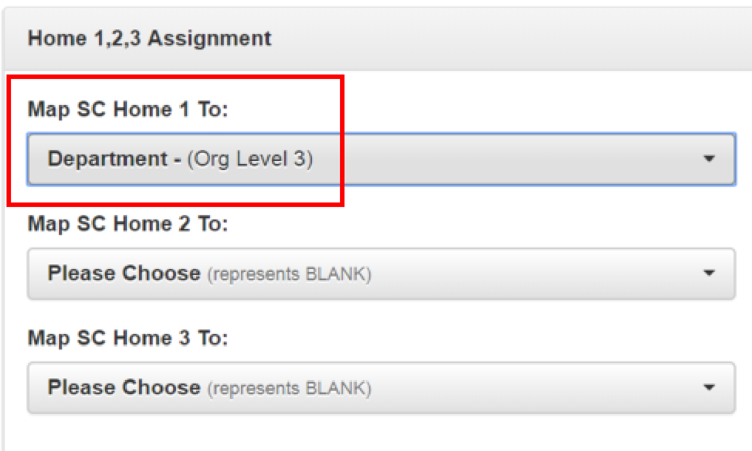
2. The system displays the **Time Clock Settings** screen.



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.



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.

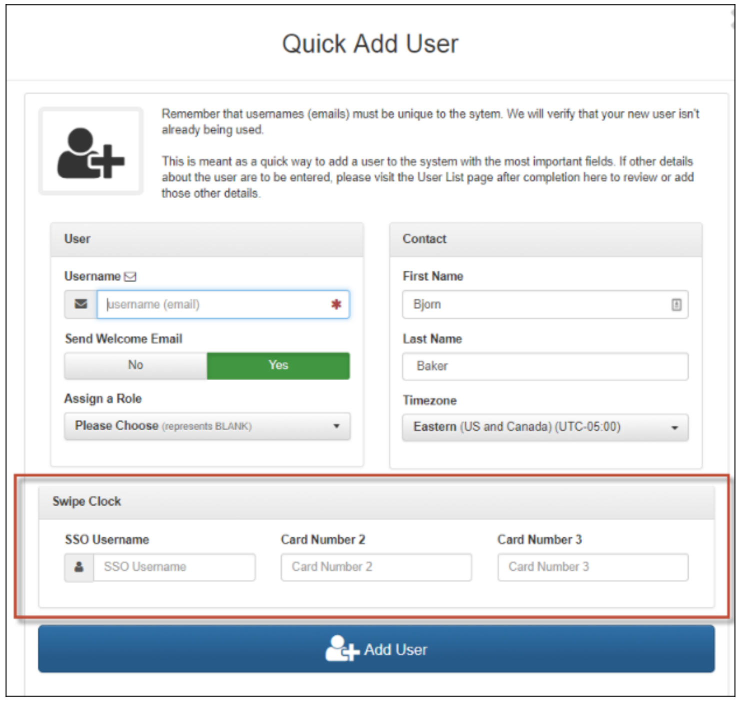
Setting Up the SwipeClock User Credentials

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.

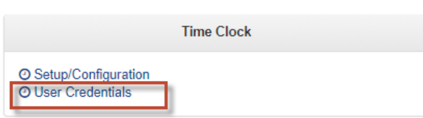
If the Employee user is also a SwipeClock Admin, please see the section on SwipeClock Admin setup .

Creating SwipeClock User after Advanced HR User was Created

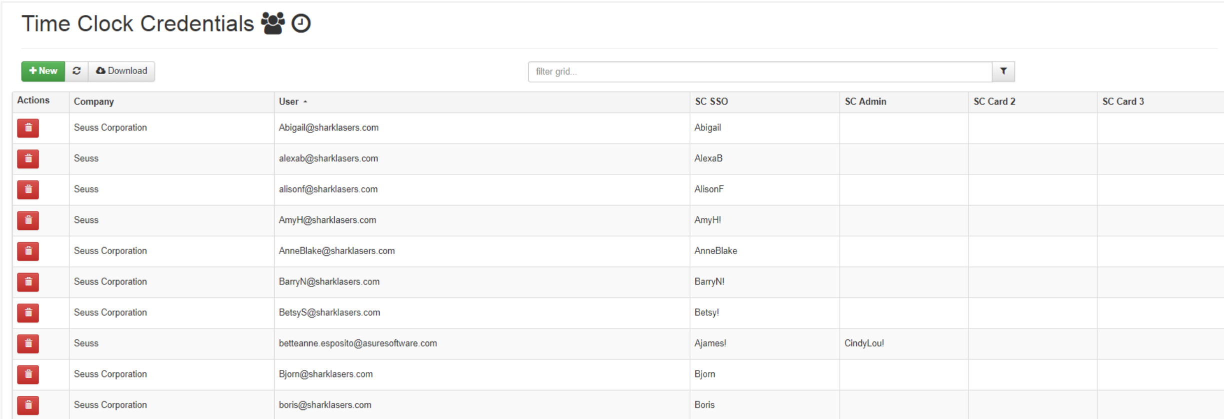
If the SwipeClock user was not setup from the **User Quick Add**, the Advanced HR user must be created first, then you can link this user and add the SwipeClock user.

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.

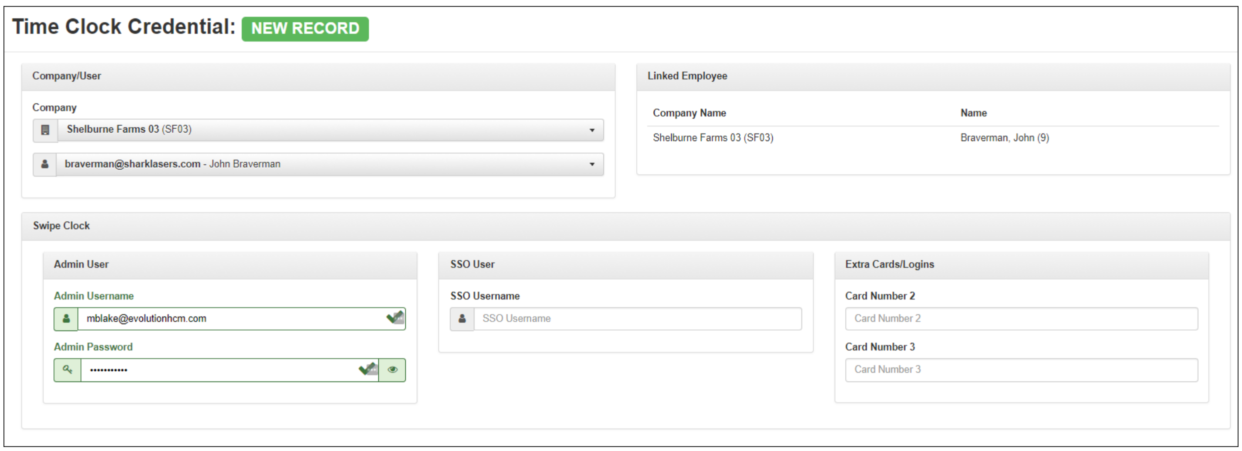
1. Go to **HR Admin – Time Clock – User Credentials**.



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



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



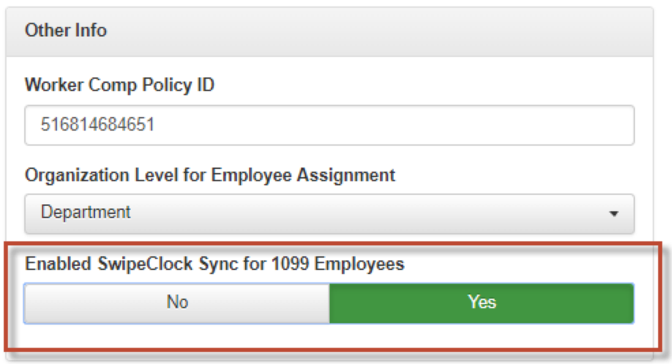
4. In the **Admin User** section, enter the **Admin's Username** and **Admin Password**. Not all Employees will have an Admin Username. These are reserved for Supervisors or Mangers (Someone that will manage other employee's SwipeClock punches).
5. Enter the user's **SSO Username**.
6. Optionally, if the user will have additional punch cards/logins, enter these in the **Extra Cards/Logins** section, in the **Card Number 2** and **Card Number 3** fields.
7. Click **Save Changes**.

Syncing the Employee to the SwipeClock Employee Record

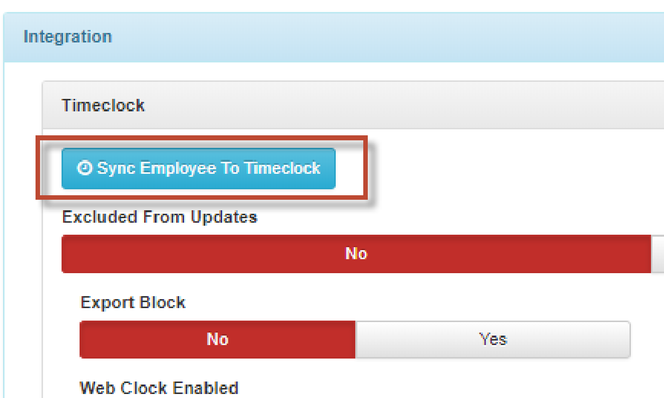
Once the SwipeClock Configuration is complete, the system will automatically send a sync to SwipeClock of any new Employee data changes. The **Sync Employee to Swipe Clock** button is a manual option for this purpose in the system.

Setup

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



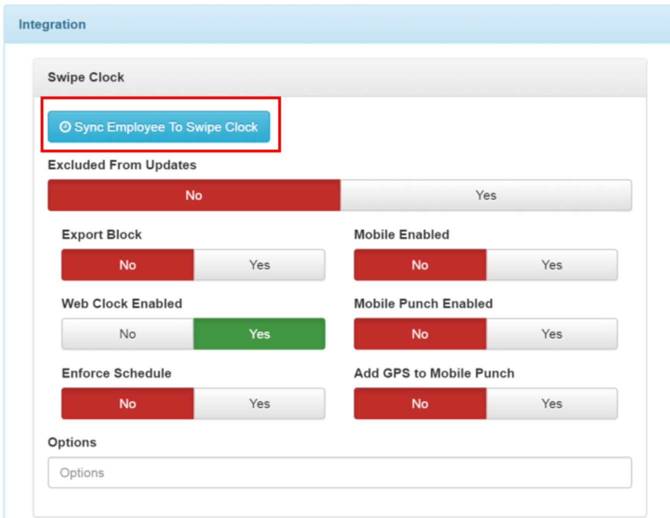
The **Sync Employee to Timeclock** option button will be added to the **HR Admin – Employee Maintenance** - **Employee Summary** screen if the above option is set to **Yes**.



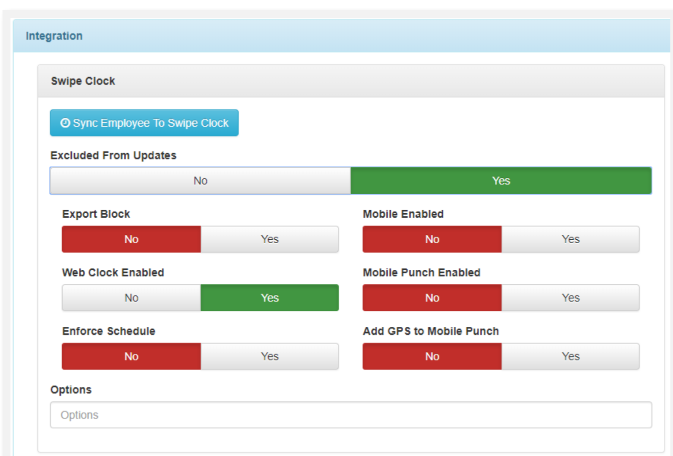
The **Sync Employee to Swipe Clock** button is a manual option for this purpose in the system.

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.

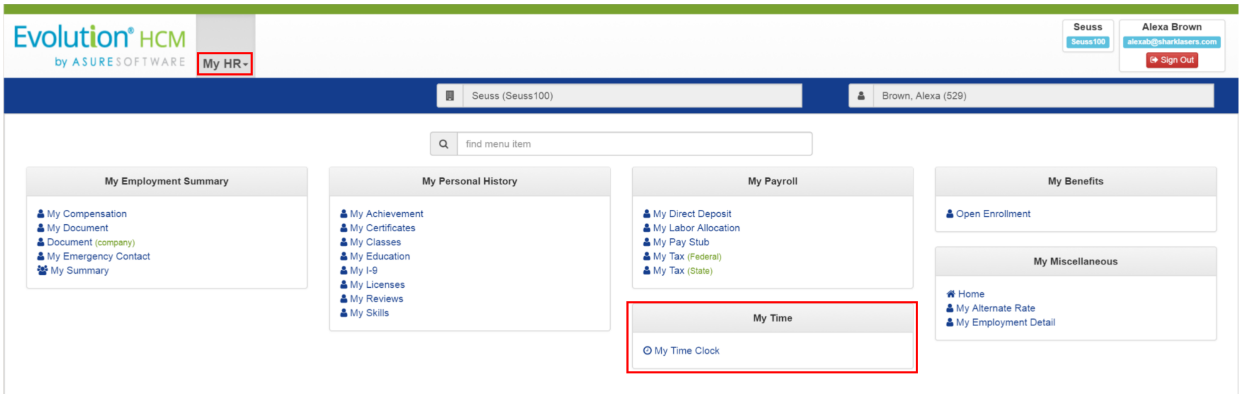


If this is a salary or non SwipeClock user, meaning the employee will **not** be using SwipeClock, then the Admin needs to set the **Exclude From Updates** option on this employee from **No** to **Yes**. Otherwise each update to the employee will try to send information to SwipeClock which will create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

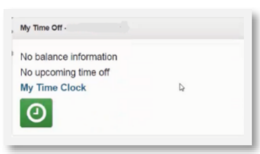


The End User Experience (SwipeClock)

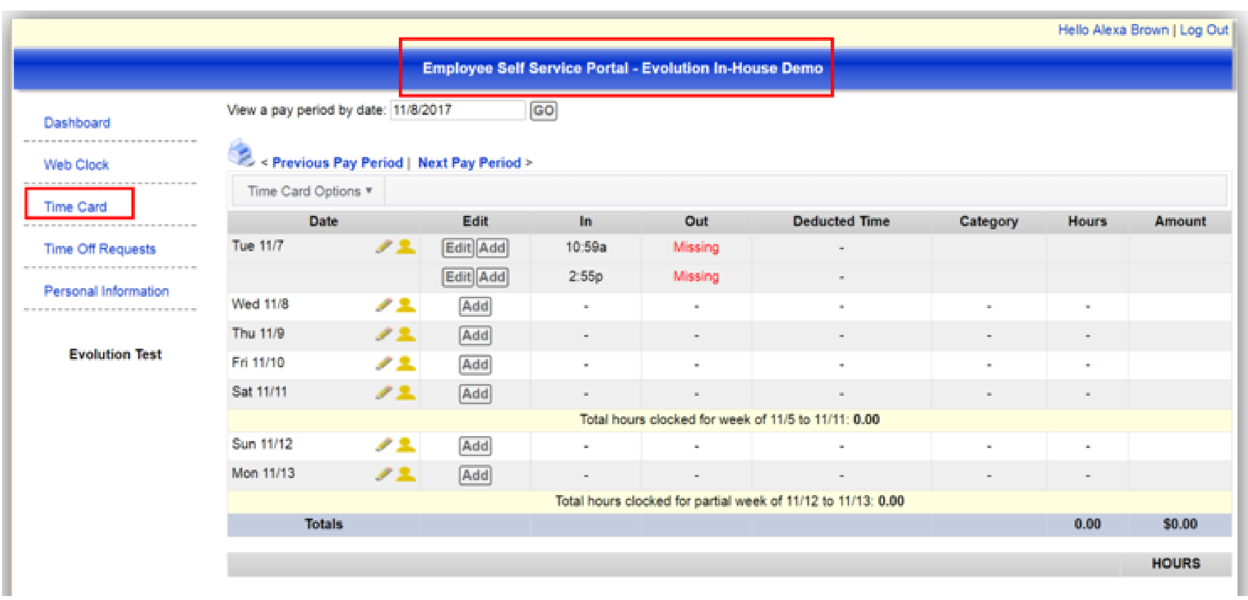
Once the user credentials have been set up, the employee will have a seamless experience while using SwipeClock. On the employee's **My HR** tab in Advanced HR, there will be a **My Time** pane with a **My Time Clock** menu option.

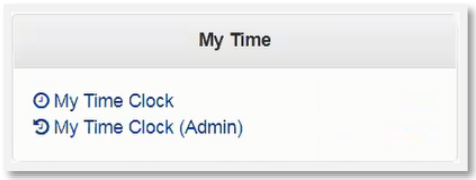


From the Dashboard, an option to open **My Time Clock** is available.



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:

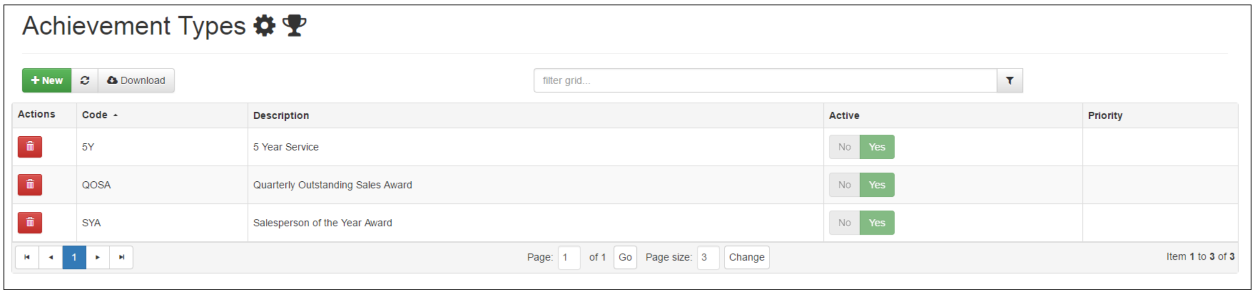
- Creating **Position Types**. See Position Type
- Adding **Position/Org Change Reasons**. See Position/Org Change Reason
- Creating an organizational structure in the **Employment Detail**: **Reports to** Fields.

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

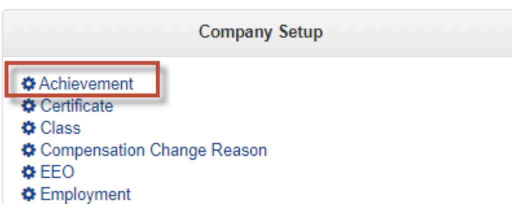
This option provides a high-level list of an employee's achievements – that is – employee accomplishments or recognitions. Accomplishments can also include a level of proficiency or a years of service marker.

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.

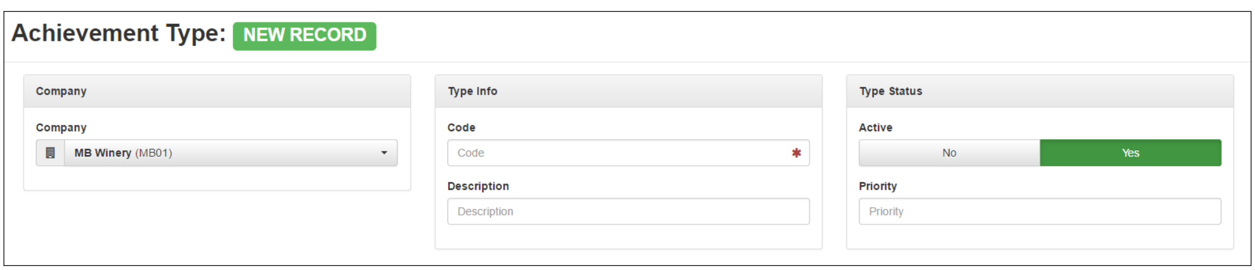


To add a new Achievement Type:

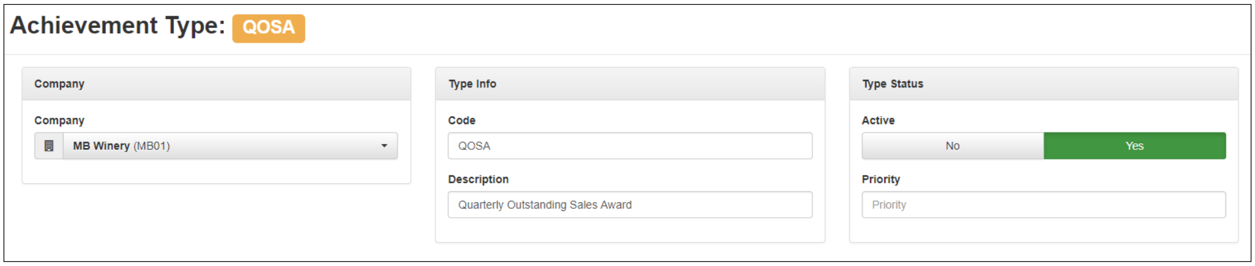
1. Go to **HR Admin – Company Setup – Achievement**.



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



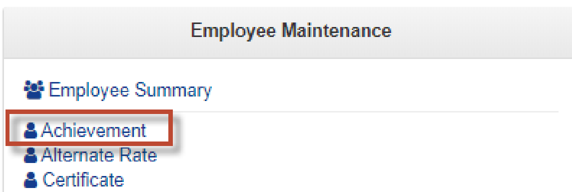
3. Select the correct **Company**.
4. Enter a **Code** for the Achievement.
5. Enter a **Description** of the Achievement.
6. In the **Type Status** section, make sure the **Active** Yes/No toggle switch is set to **Yes**.
7. Assign a **Priority** to the Achievement.
8. Click **Save Changes**.



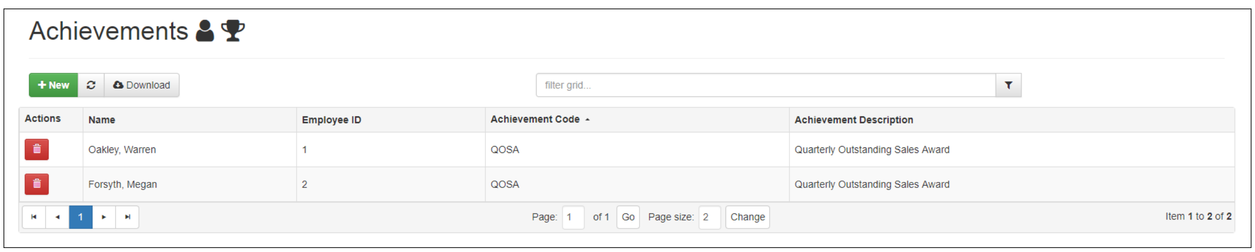
The new Achievement you created is now ready to be used – that is, it can be applied to an employee.

To apply an achievement to an employee:

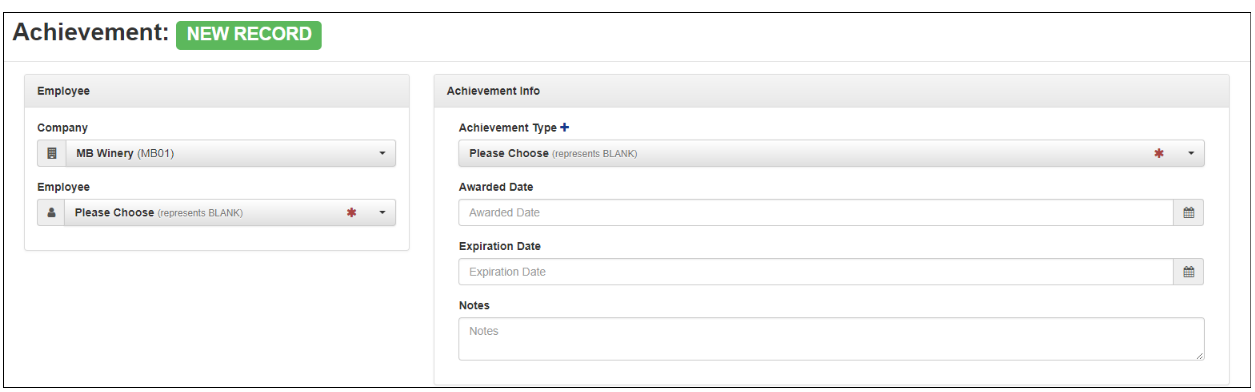
1. Go to **HR Admin – Employee Maintenance – Achievement**.



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



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

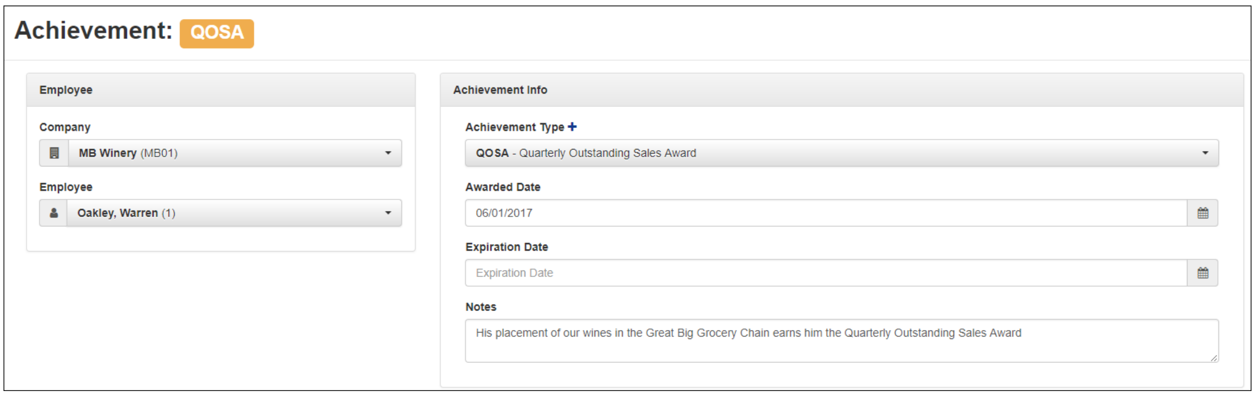


3. Select the **Company** if not already selected.
4. Select the **Employee**.

5. Select the **Achievement Type** from the dropdown.

   You will see the newly created Achievement as one of the possible values to select.

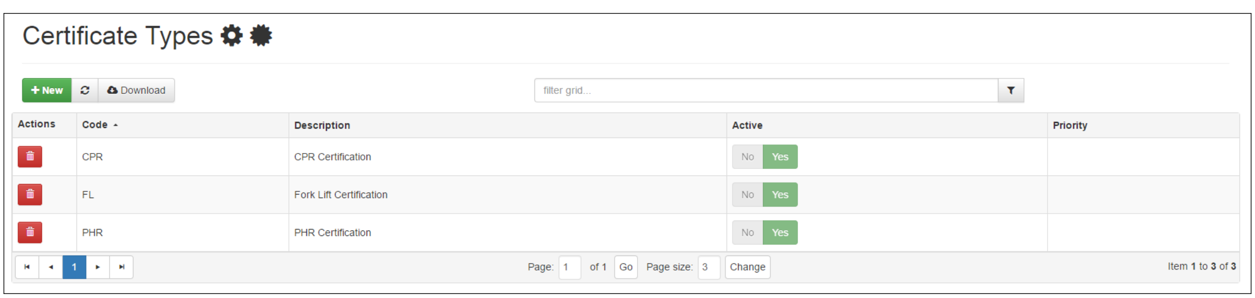
   You can also add a new Achievement on the fly by clicking the blue Plus Sign (**+**).
6. Select an **Awarded Date** by clicking on the calendar icon.
7. If necessary, select an **Expiration Date** by clicking on the calendar icon.
8. Add any **Notes** concerning the achievement, if desired.
9. In the 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.



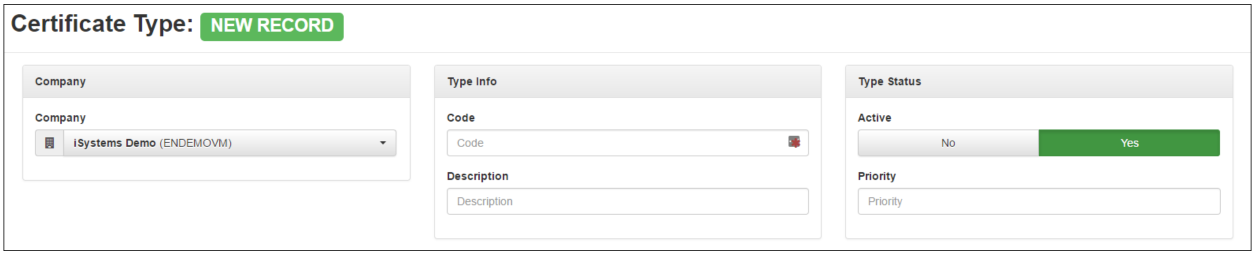
The achievement is then added to the employee's record – in the example shown above, Warren Oakley of the MB Winery company was given the Quarterly Outstanding Sales Award. This will appear in his **My HR** screens under **My Personal History**.

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.

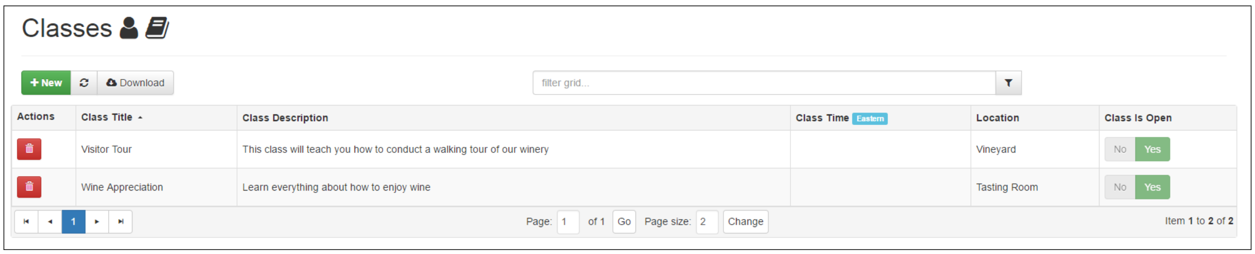


To add a new Certificate Type, click on the **+ New** button and complete the information.

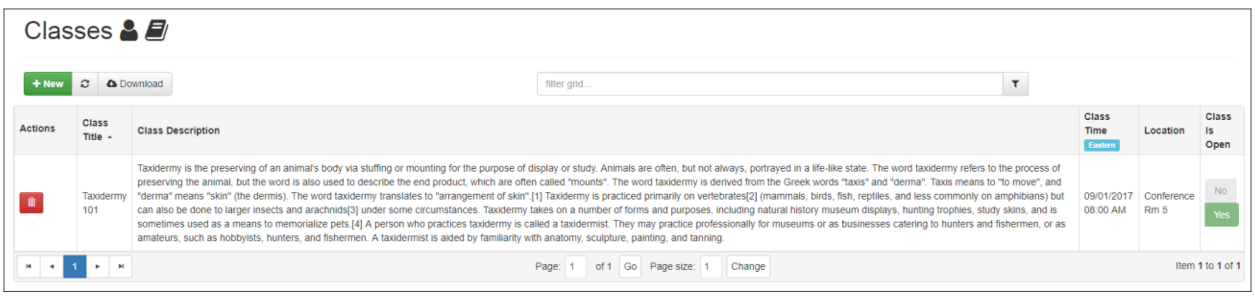


Class

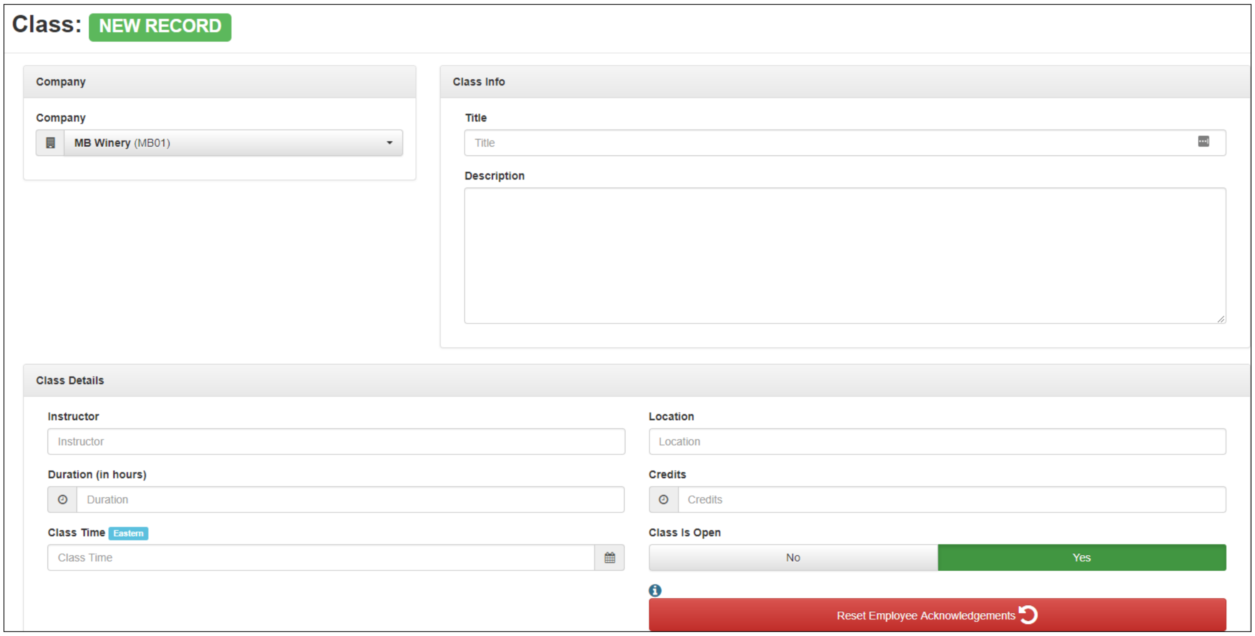
The Advanced HR training class management system allows you to set up classes and track employees' participation in training. The Classes dashboard lists the existing classes.



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



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.



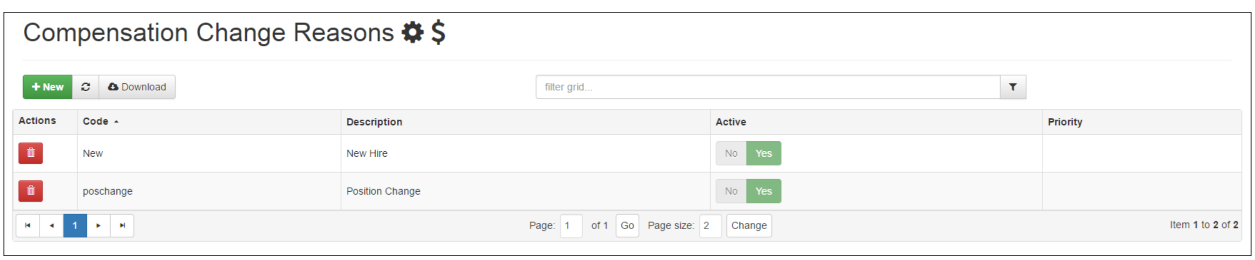
Once the class is set up you can either mass enroll employees via the **Rapid Enroll** feature or individually enroll employees. The latter method allows you to enter private notes to the employee and attach additional documents.

Reset Employee Acknowledgements Button

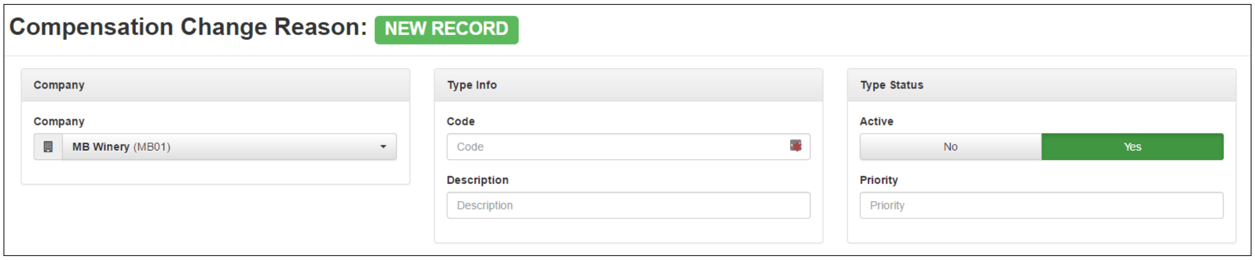
Clicking the **Reset Employee Acknowledgements** button will reset the acknowledgement status for every employee enrolled in this class.

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**.

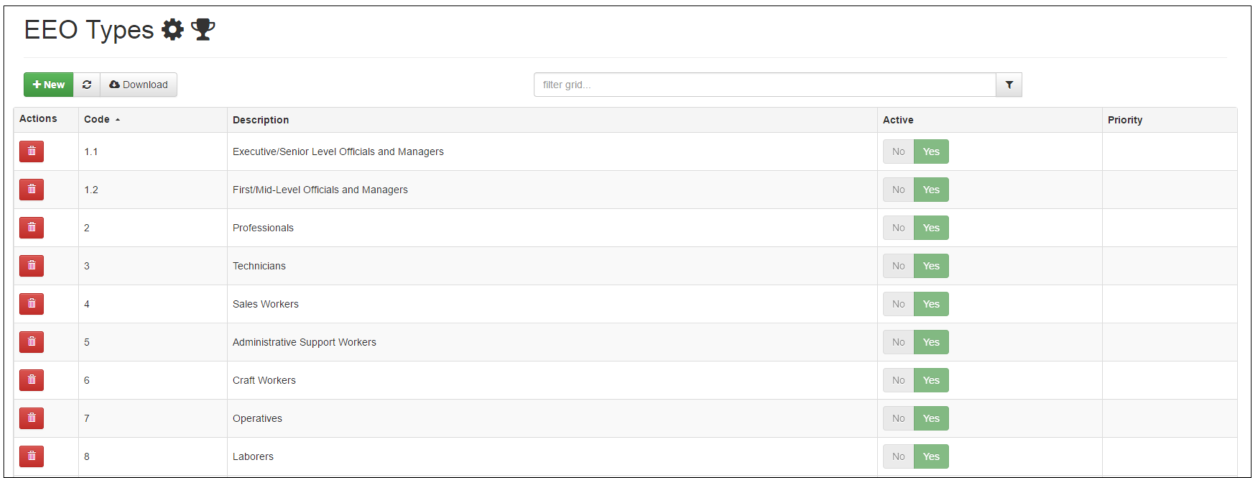
Compensation Change Reasons



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

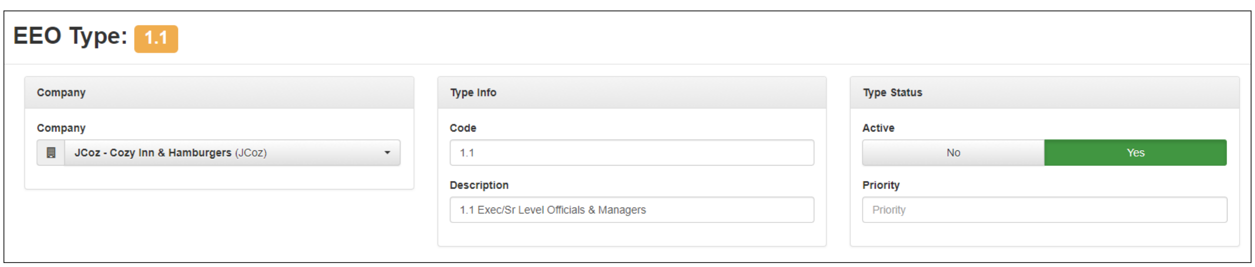


EEO Type

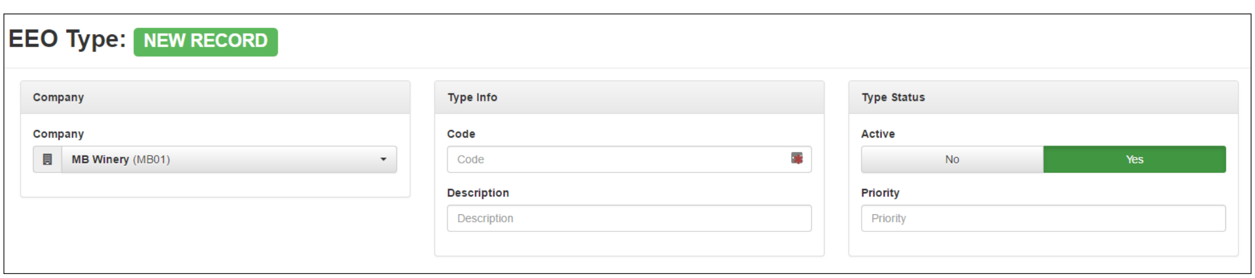


Actions	Code	Description	Active	Priority
	1.1	Executive/Senior Level Officials and Managers	No Yes	
	1.2	First/Mid-Level Officials and Managers	No Yes	
	2	Professionals	No Yes	
	3	Technicians	No Yes	
	4	Sales Workers	No Yes	
	5	Administrative Support Workers	No Yes	
	6	Craft Workers	No Yes	
	7	Operatives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

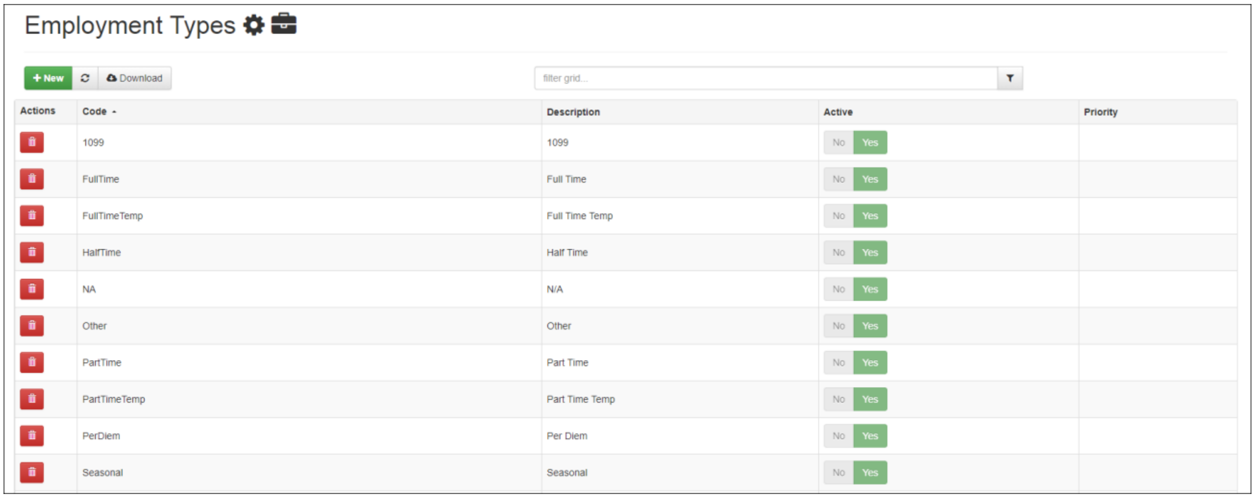
Click on a row to get the details of an EEO Type.



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



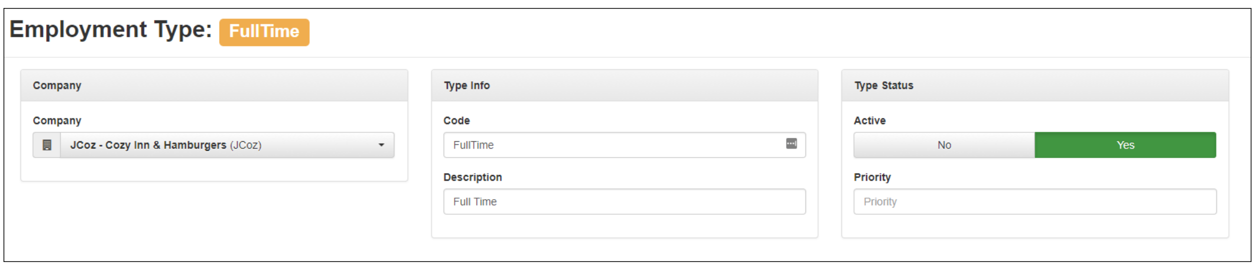
Employment Type


Employment Types

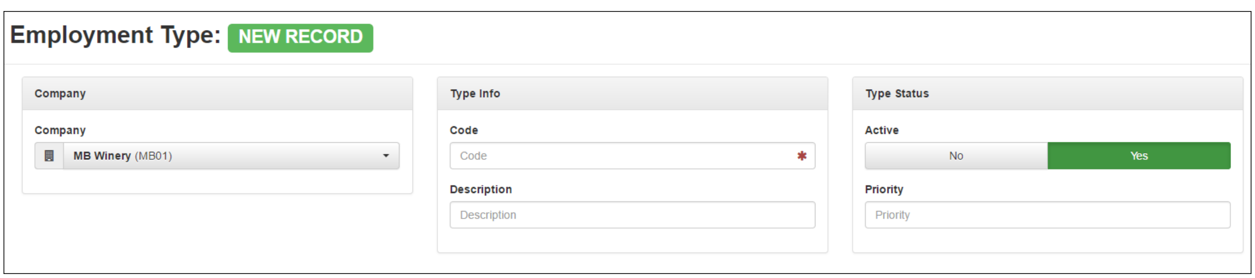
+ New | Download

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.



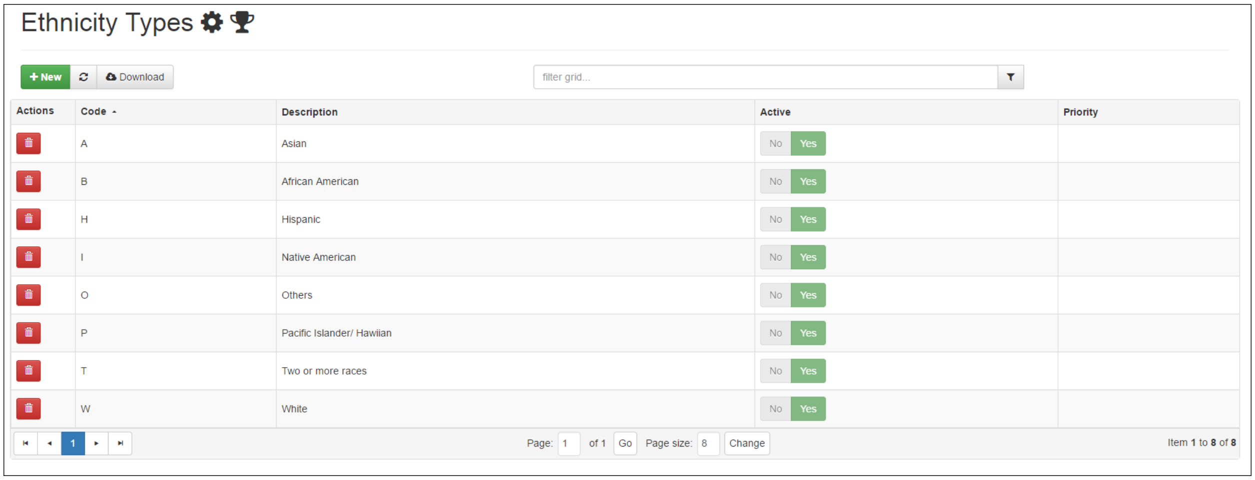
To add a new Employment Type, click on the **+ New** button and complete the information.



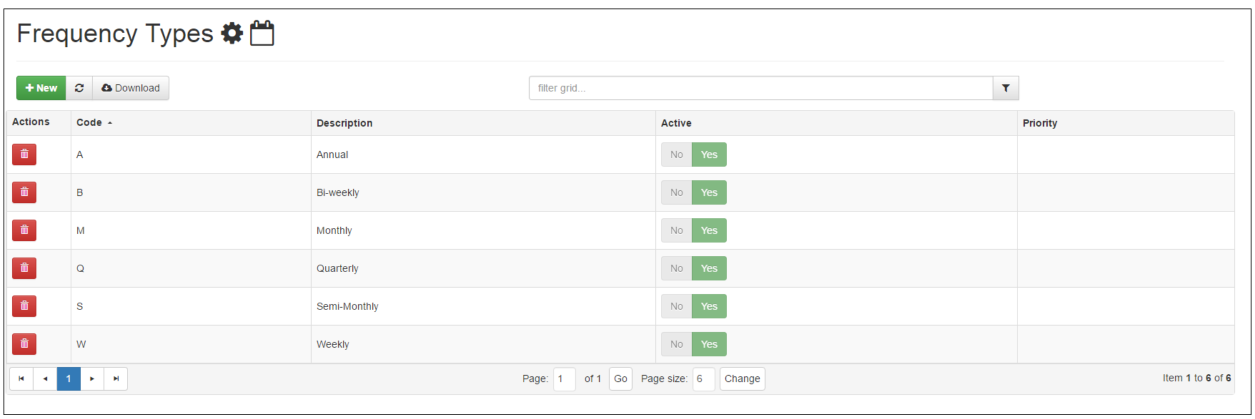
Note that the Employment Type value can be defaulted in for any new hires on the **HR Admin – Company** – **Company List** screen.

Ethnicity Type

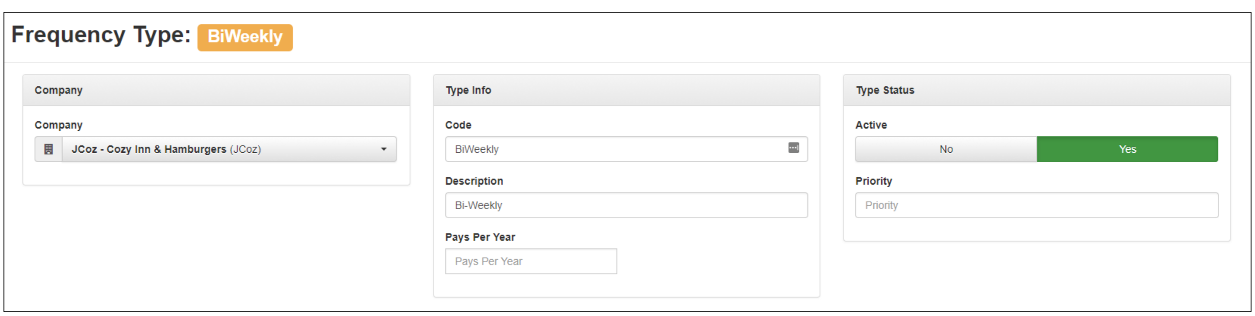
This is the employee's ethnicity for EEO reporting purposes.



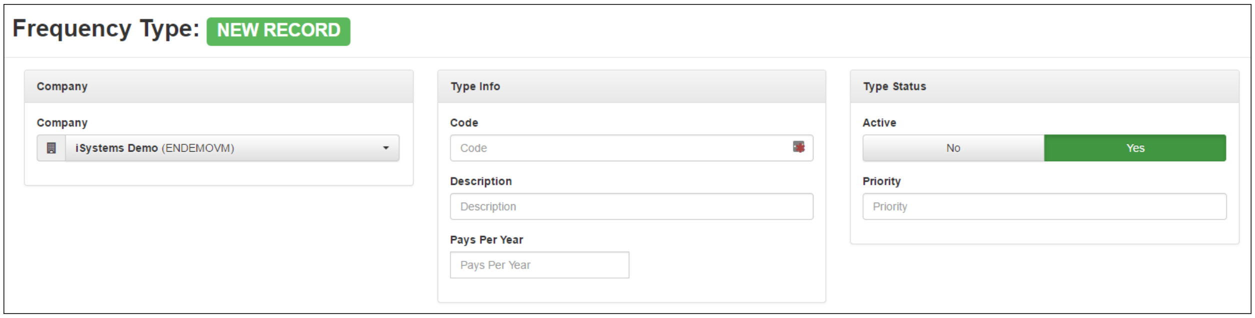
Frequency Type



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

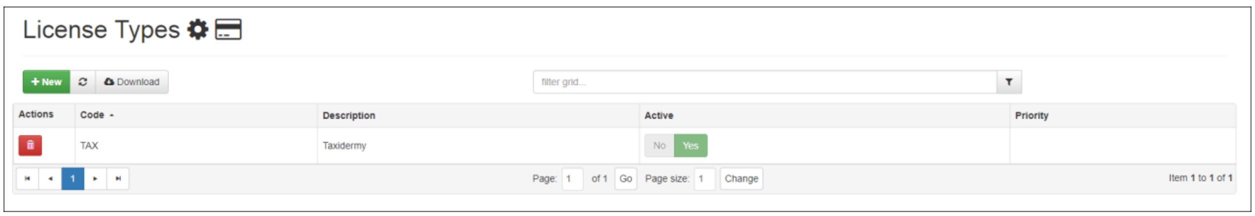


To add a new Frequency Type, click on the **+ New** button and complete the information.

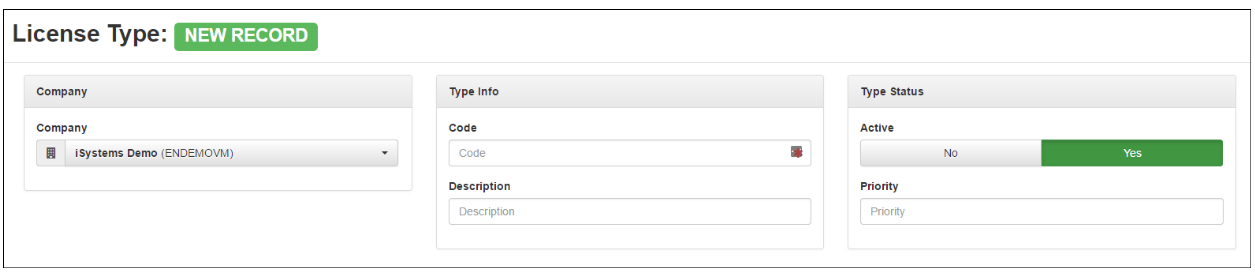


License Type

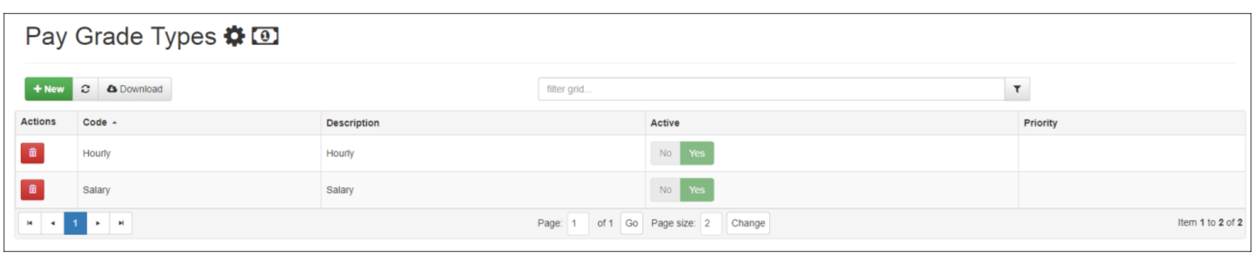
Add details on any license including expiration dates and attached documents.



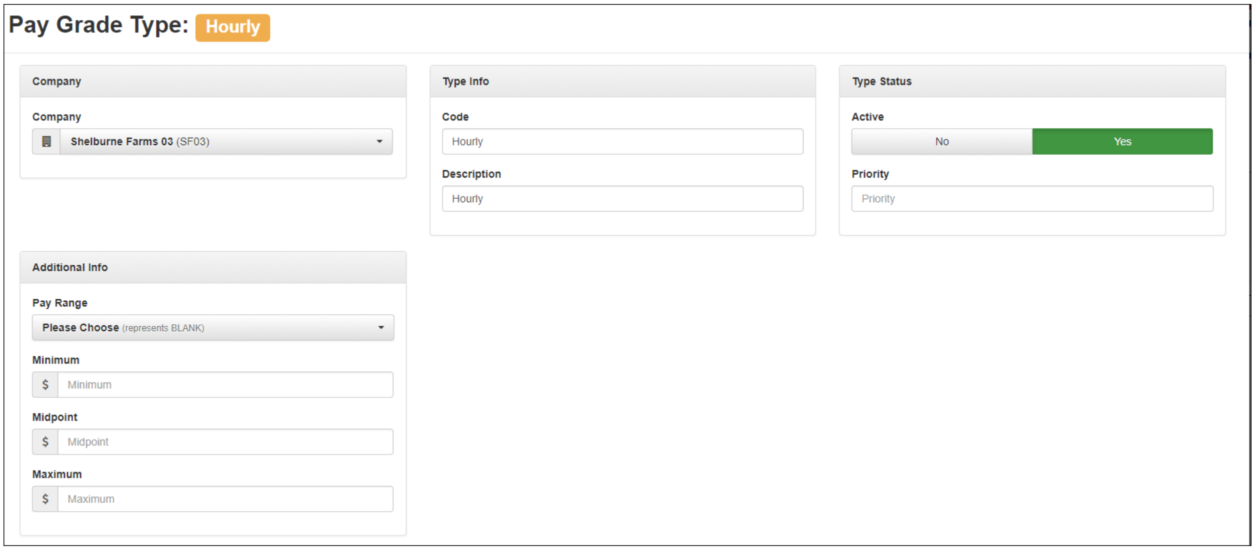
To create a new License Type, click the **+ New** button.



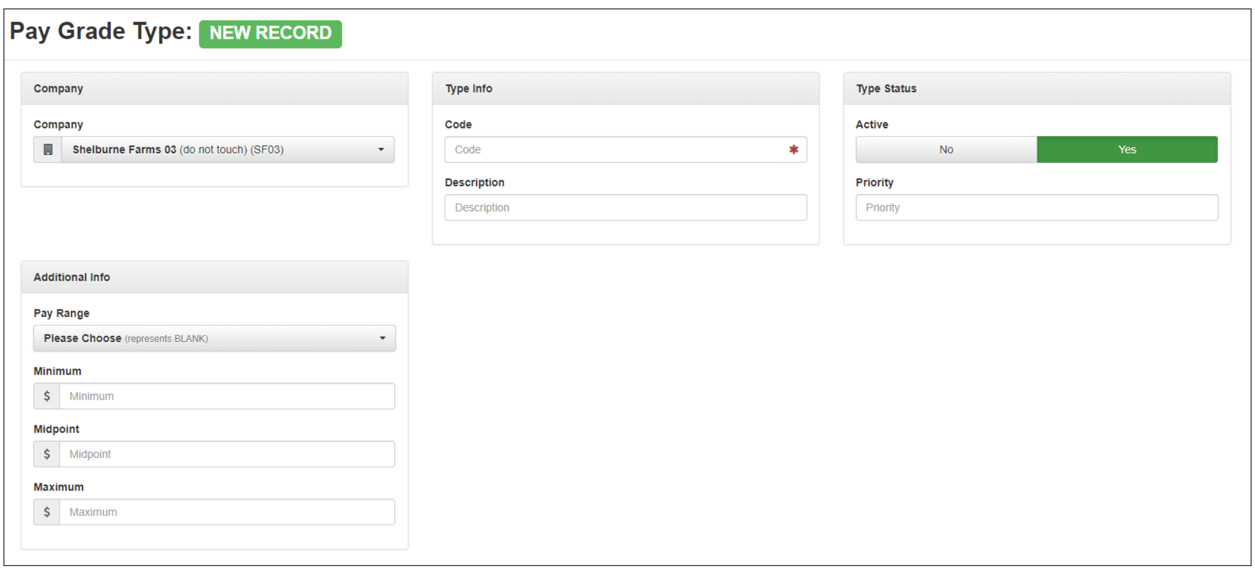
Pay Grade Type



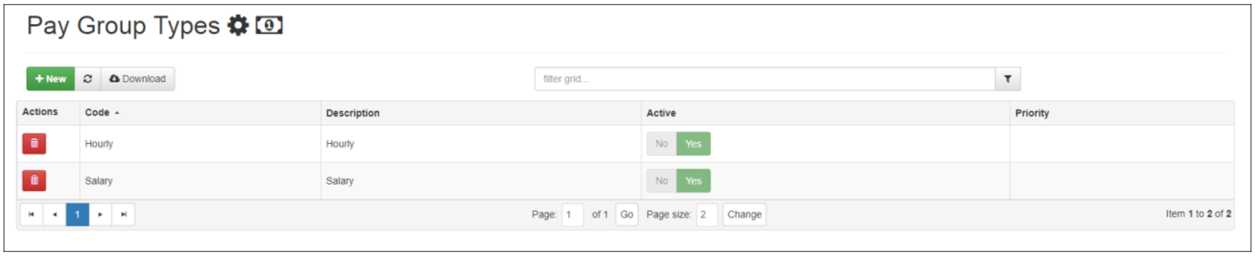
Click on a Pay Grade type row to get the details.



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



Pay Group Type

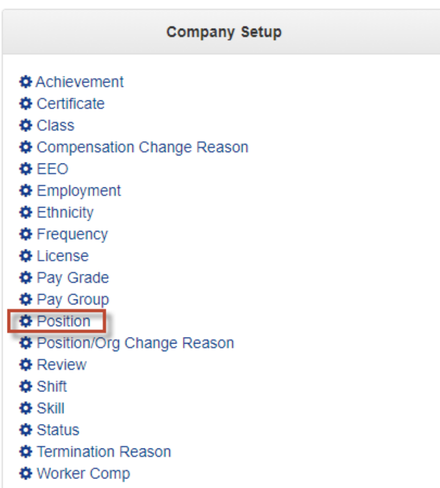


Position Type

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**.

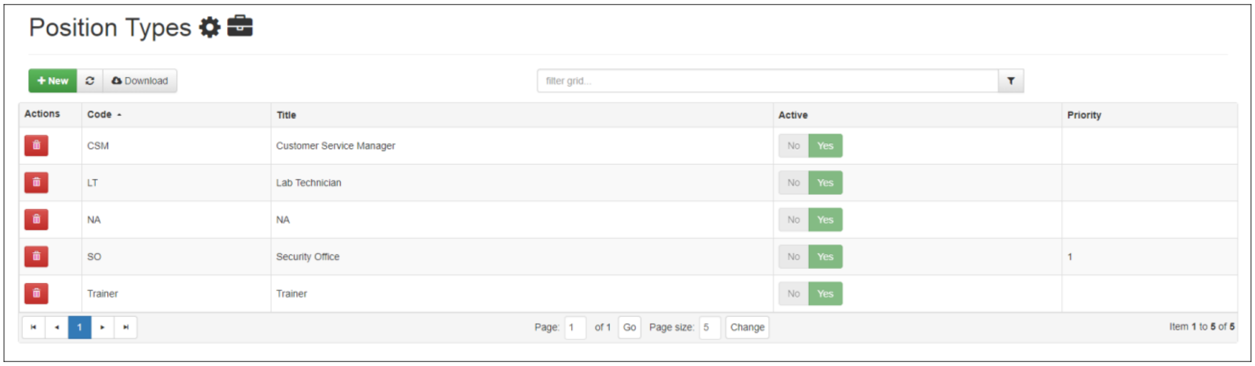
Go to **HR Admin – Company Setup – Position**.



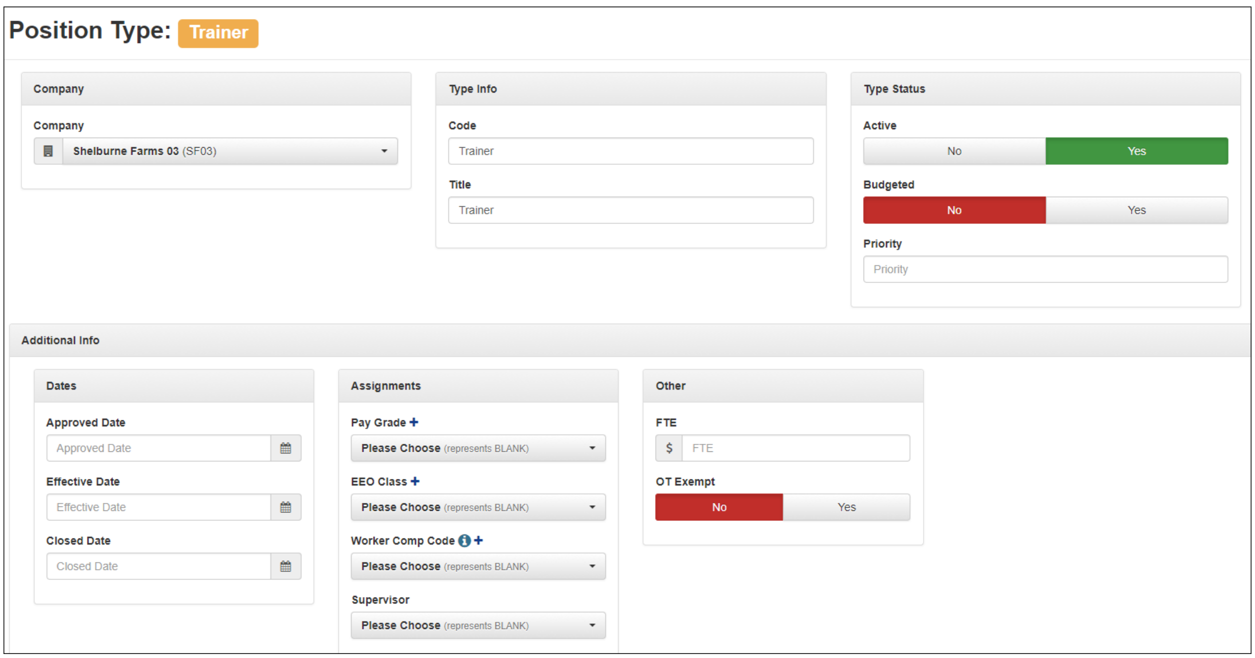
The system displays the **Position Types Dashboard**. This Dashboard will display all the positions for a company.

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.

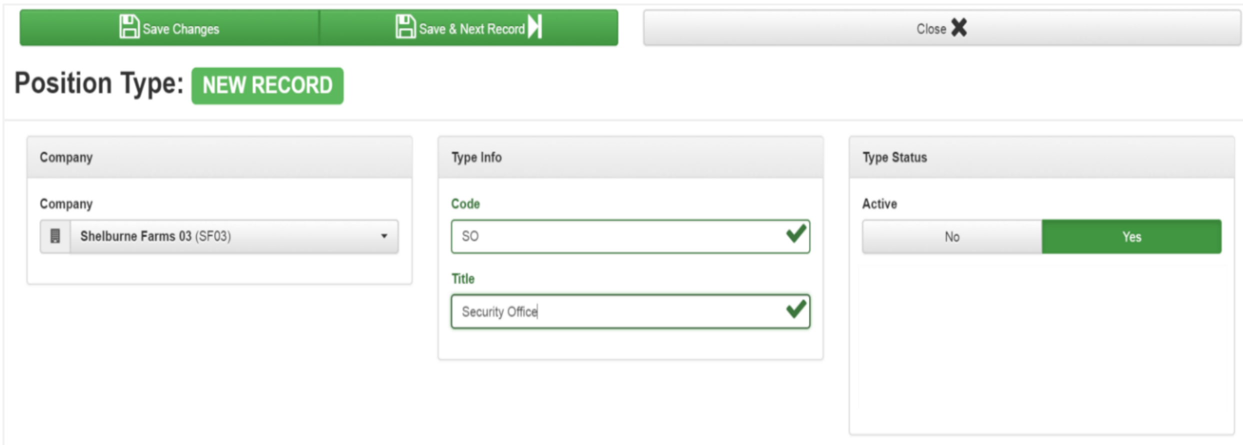


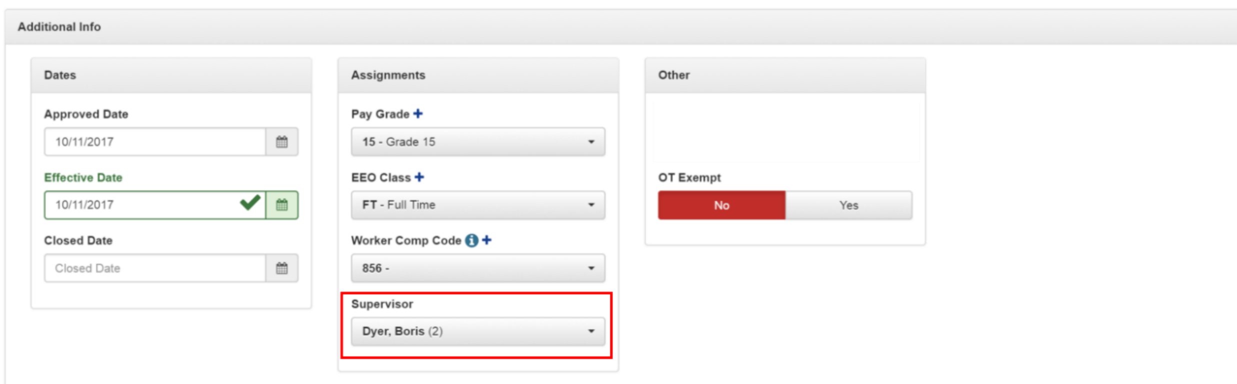
Click on a Position Type row to see the details, for example, for the Trainer position.



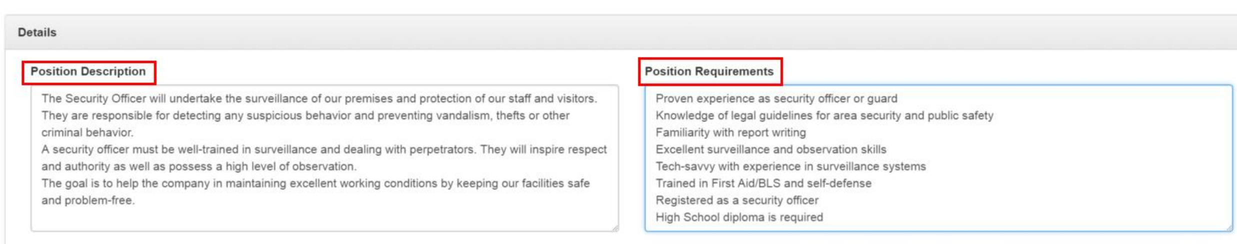
To Create a New Position

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.



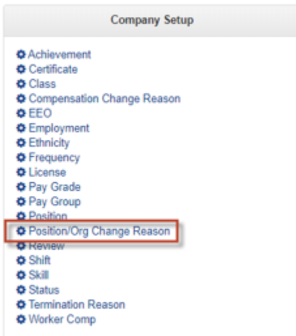


7. You can add **Dates** (including **Effective Dates**).
8. Create **Pay Grades** and assign a **Supervisor**.
9. Make the position **Exempt from Overtime**.
10. Add a Position (Job) **Description** and **Requirements** in the **Details** tile:



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

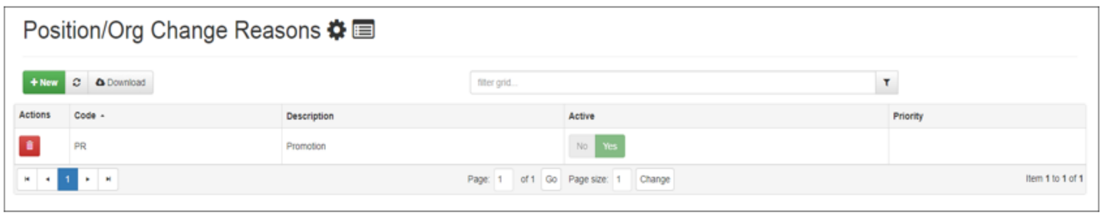
Position/Org Change Reason



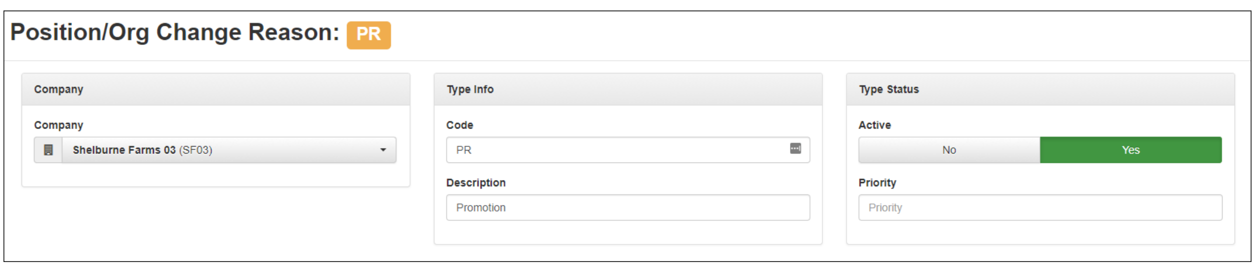
Position/Org Change Reason allows the user to create and set job designations that are tied to:

- Work environment
- Job duties
- New initiatives

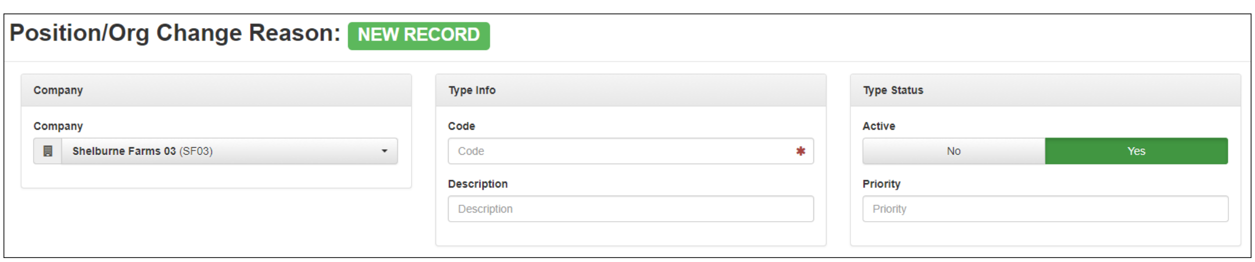
For example, a Security Guard position could be changed due to a re-organization of management structure.



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

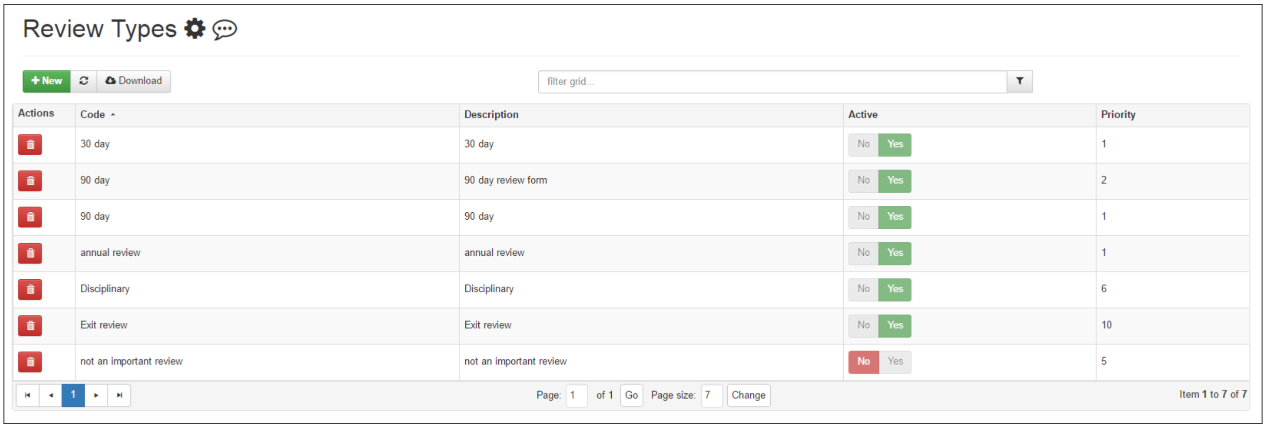


To create a new Position/Org Change Reason record, click the **+ New** button.

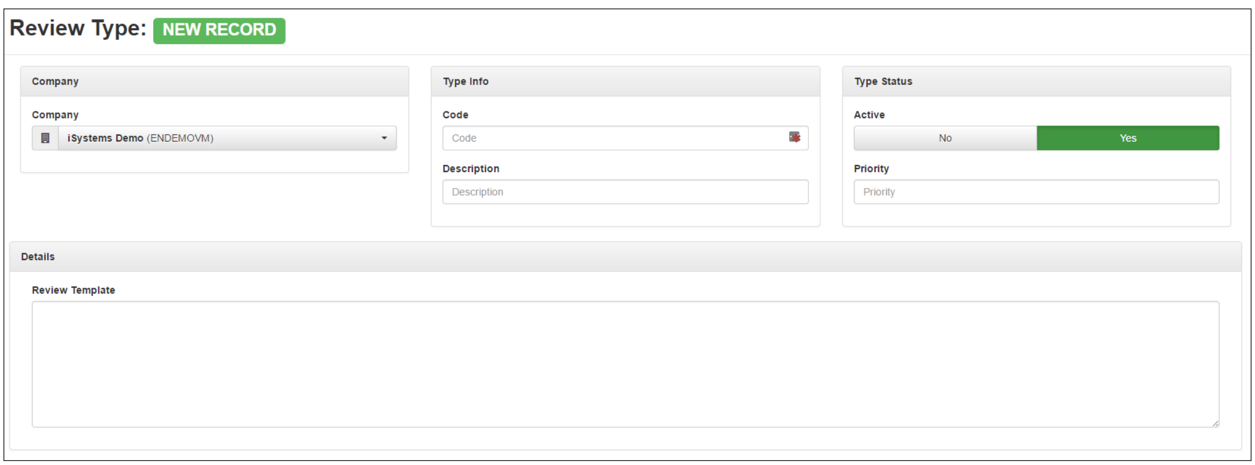


Review Type

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

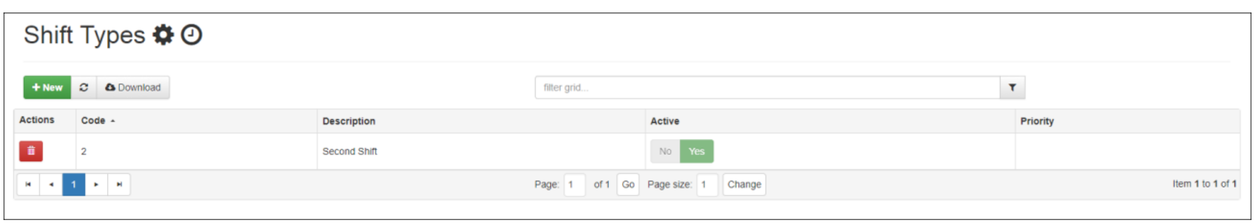


Click on a Review Type to add a review type template.

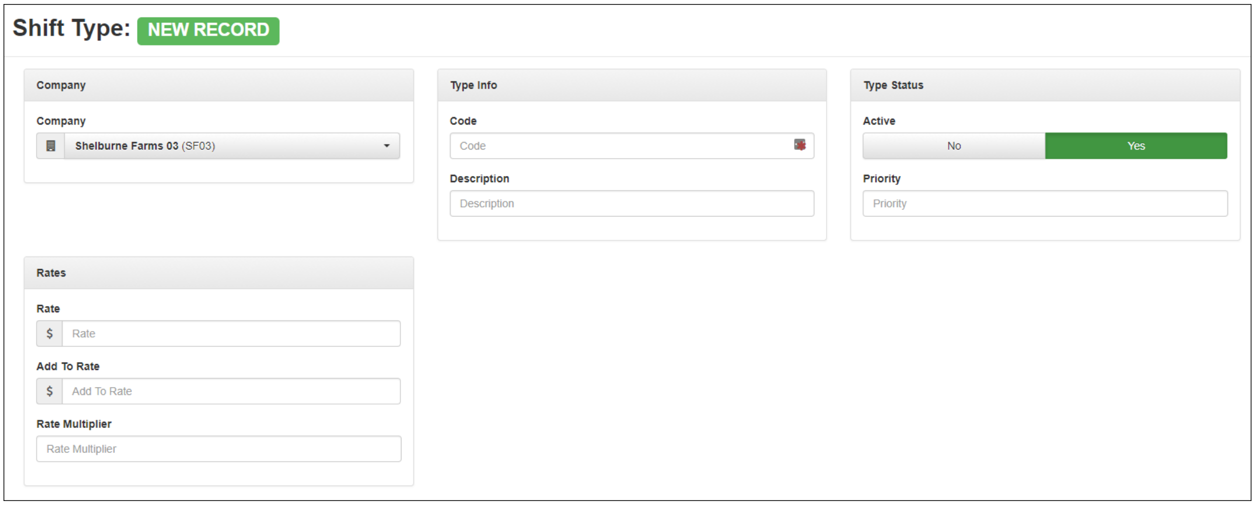


Shift Type

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



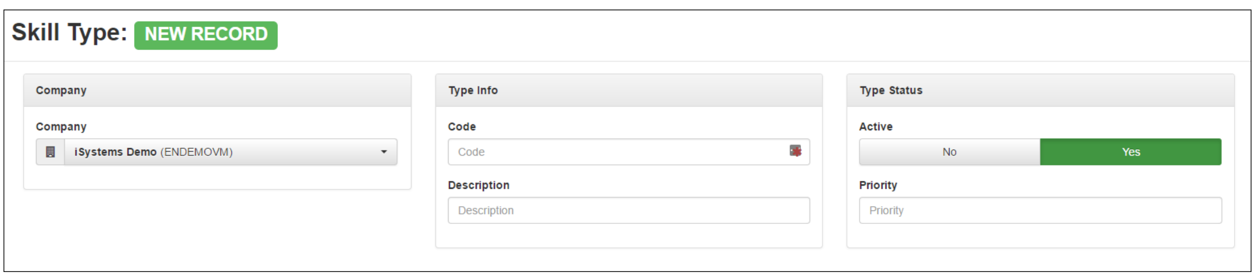
Click on the **+ New** button to add a Shift Type record.



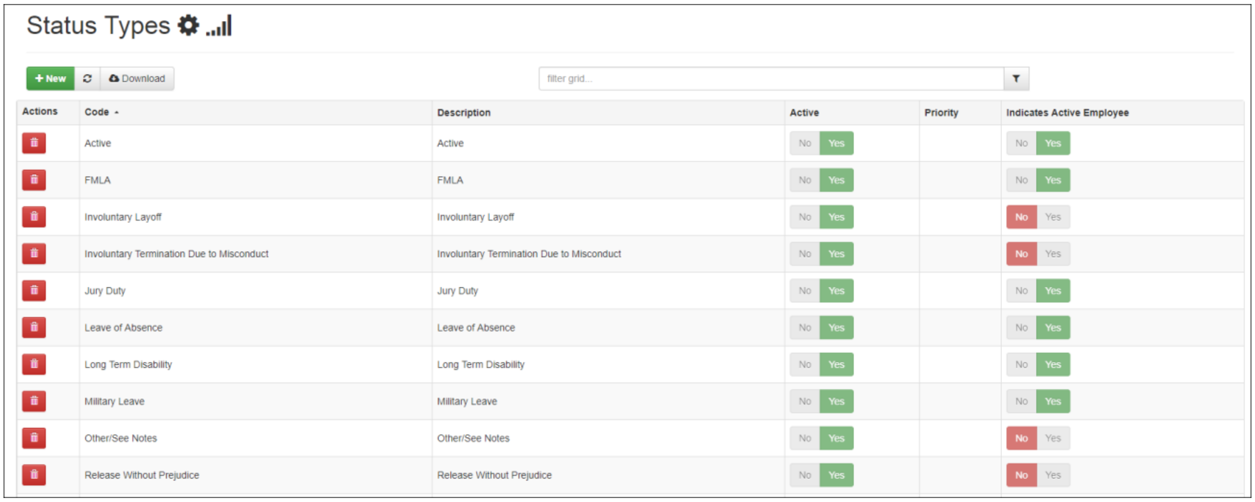
Skill Type

The Skill Types dashboard lists any skill types values.

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



Status Type

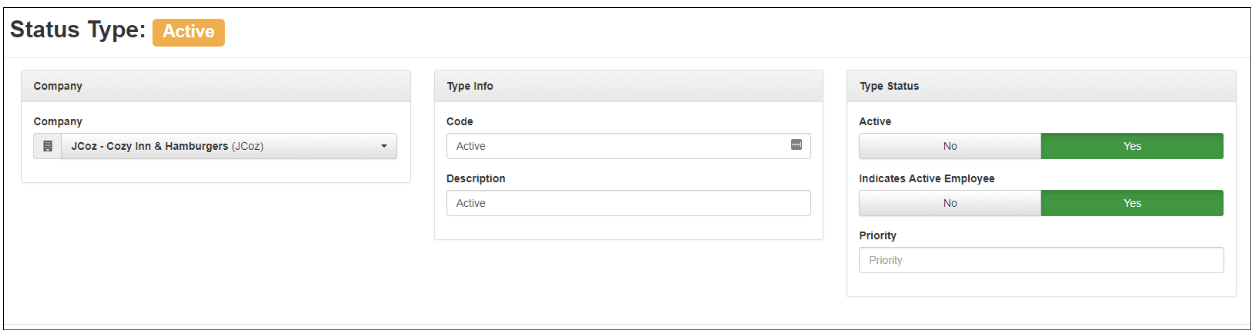


Status Types

+ New | Download | filter grid...

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

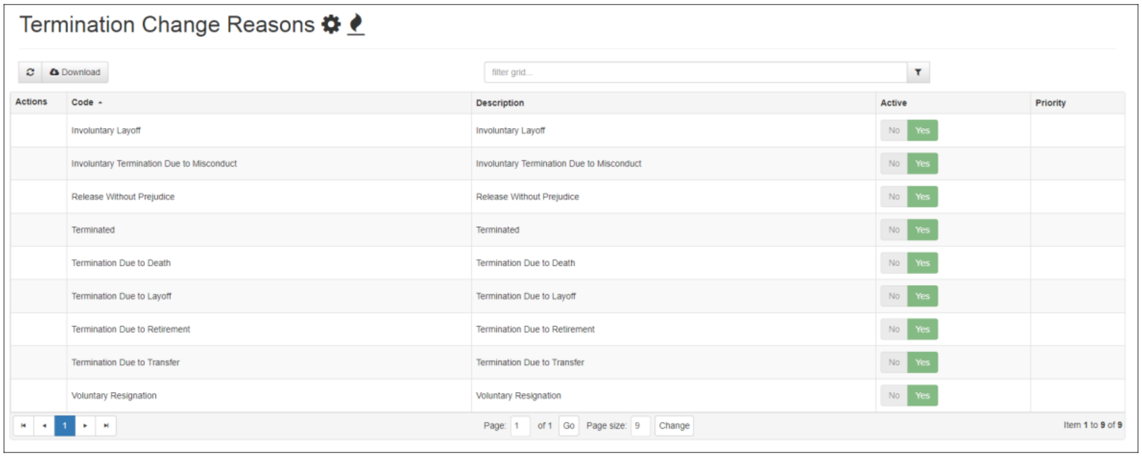
Click on a row to see the details of a Status Type.



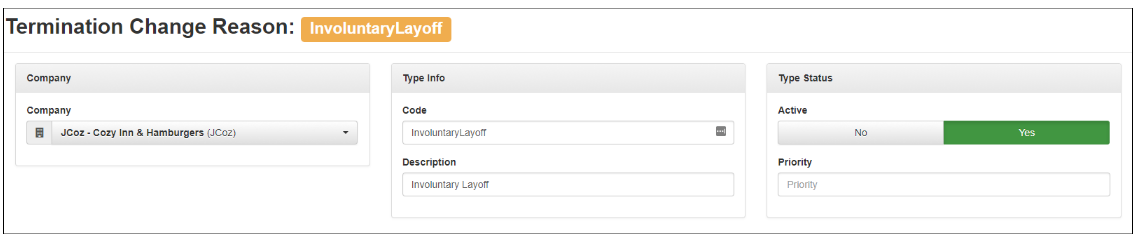
To add a new Status Type, click the **+ New** button.

Termination Change Reasons

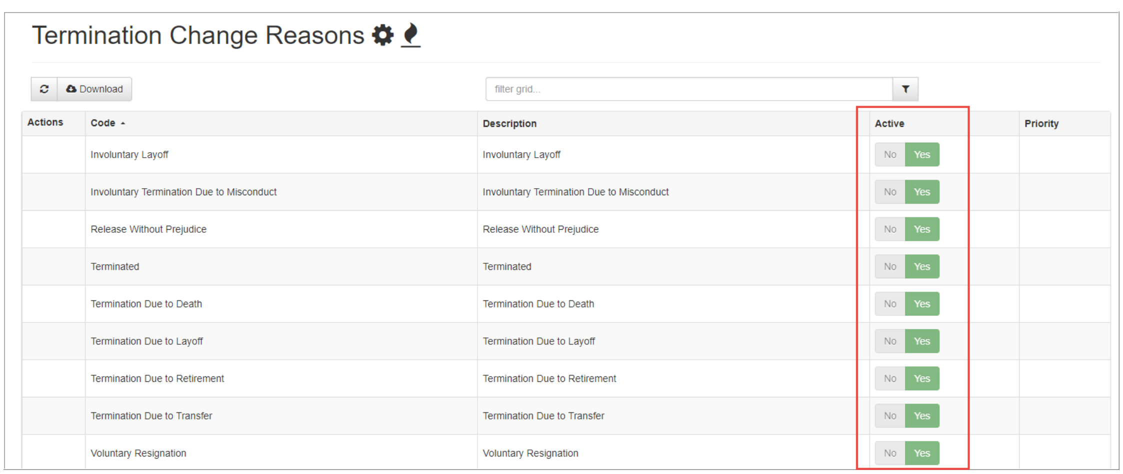
This a list of possible reasons for termination of an employee. These codes are used on the **Termination Wizard** screen when terminating an employee.



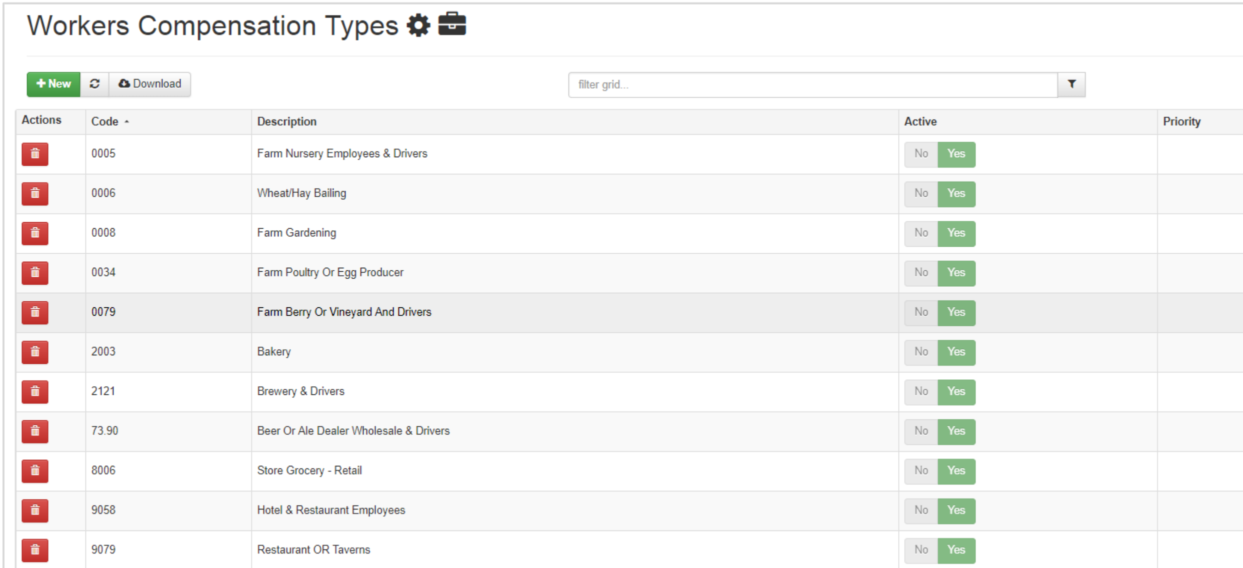
Click on a row to see the details of a Termination Change Reason.



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.



Workers Comp

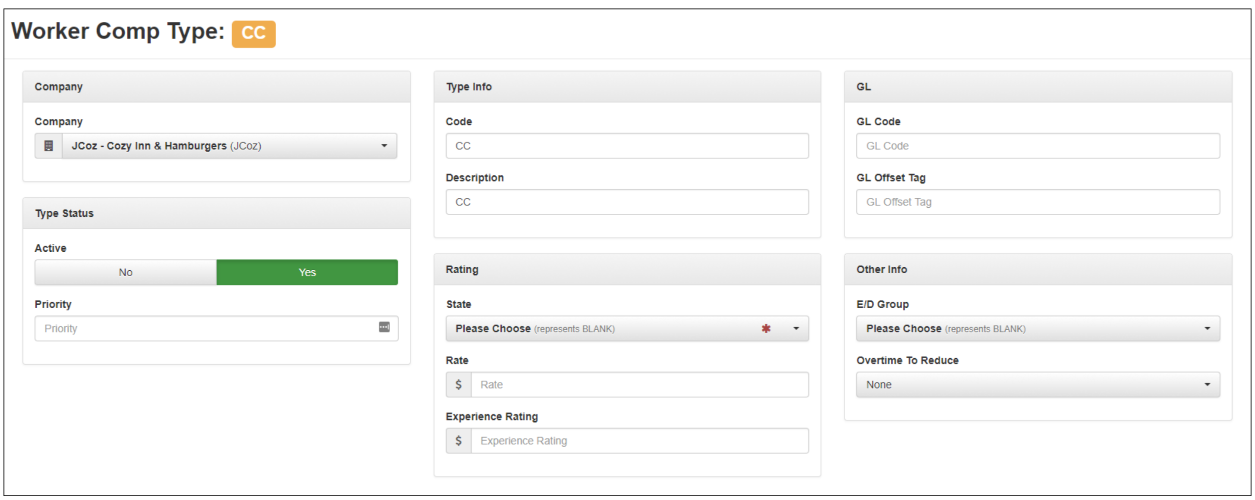


Workers Compensation Types

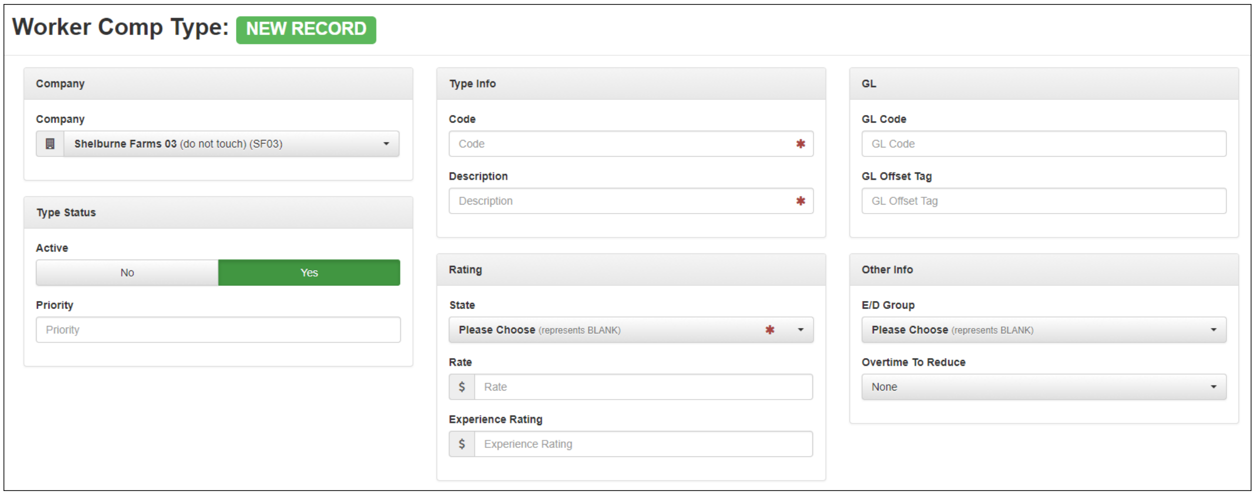
+ New | Download | filter grid...

Actions	Code	Description	Active	Priority
	0005	Farm Nursery Employees & Drivers	No Yes	
	0006	Wheat/Hay Bailing	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.

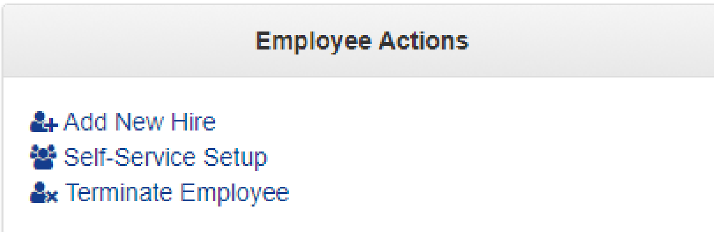


Click on the **+ New** button to add a new Worker's Comp Type.


Worker Comp Type: NEW RECORD
Company
Company
Shelburne Farms 03 (do not touch) (SF03)
Type Status
Active
No
Yes
Priority
Priority
Type Info
Code
Code
Description
Description
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

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

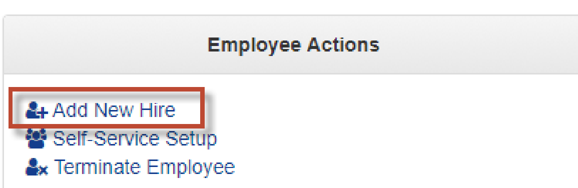
Administrators can add a new hire manually to Advanced HR 2.0 by following these steps. Managers may also be able to do some onboarding tasks, such as Prep Employees for Onboarding.

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.

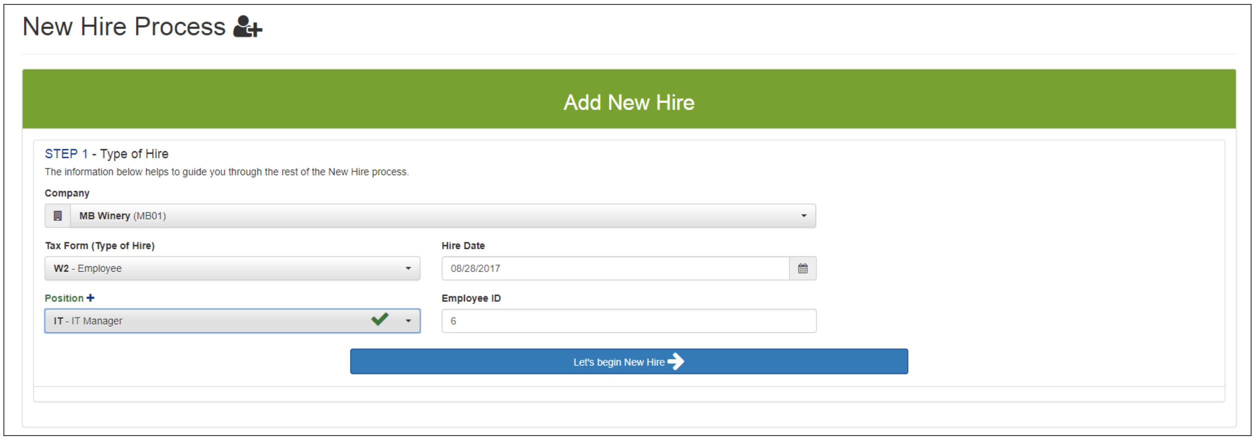
Adding a New Hire Process:

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

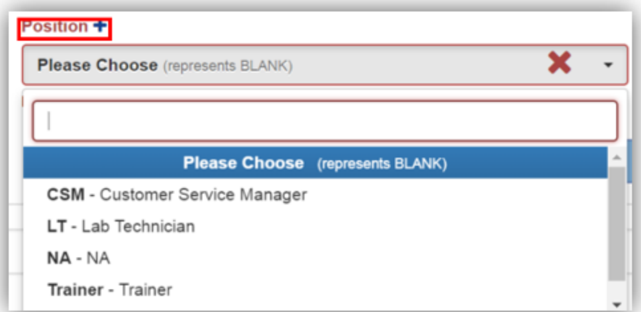
1. Navigate to **HR Admin – Employee Actions – Add New Hire**.



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

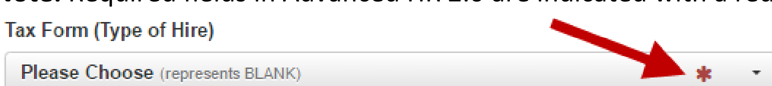


Add New Hire screen



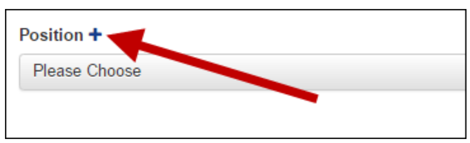
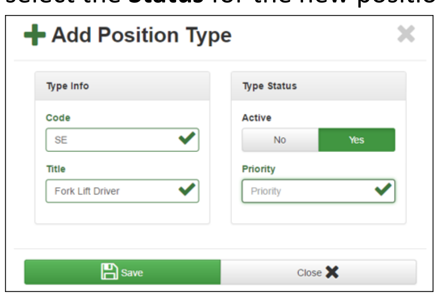
The **Position** can be selected from the dropdown menu, or added on the fly by clicking the **Blue Plus Sign**.

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



STEP 1 – Type of Hire

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

Field / Button	Description
Company *	Select the **Company**, if not already chosen.
Tax Form (Type of Hire) *	Select the Tax Form the employee will use depending on which employee type the new hire is. • **W2 – Employee** • **1099 – Contractor** The Tax Form may default to one value for this company.
Hire Date	Enter the date of hire or select the date using the calendar.
Position *	Select the Position the new hire will fill from the dropdown menu, for example **CSR – Customer Service Representative**. The list of Positions will vary by company.
	You can also add a new **Position** on the fly by clicking the **Blue Plus Sign** ✚ icon.  When the Blue Plus Sign is selected, a popup window displays to guide the user through creating a new position. You can enter a **Code**, **Title**, and select the **Status** for the new position.  If you add a Position Type on the fly above, click **Save** when complete. The new position will now be available. Administrators create Positions for a company using the **HR Admin – Company Setup – Position** screen.
Employee ID *	The system should fill in the **Employee ID** field automatically with the next available employee number for the company.
* = Required Field	

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

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

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

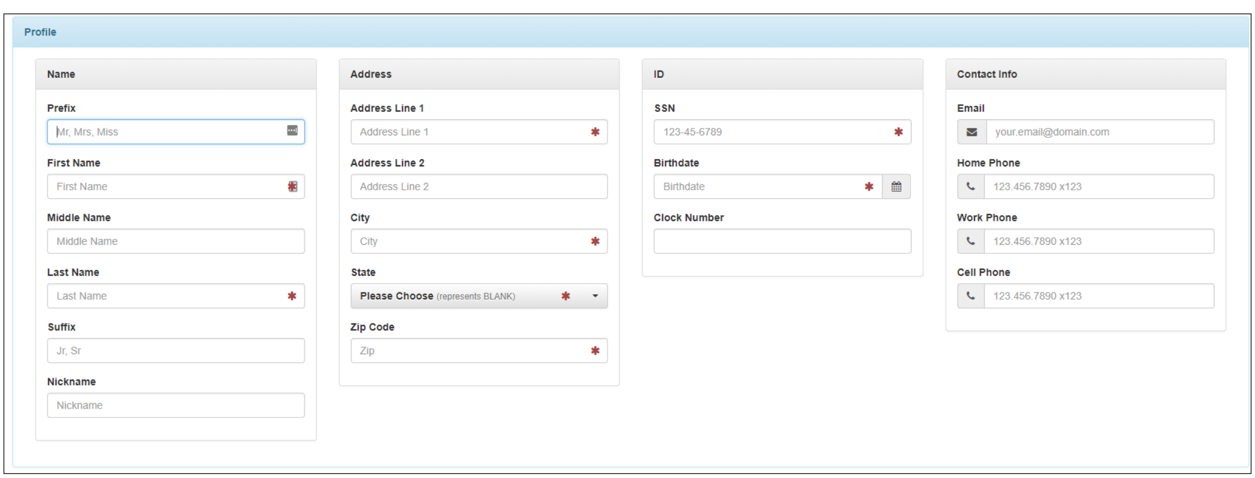
- Profile information (name, address, SSN…)
- Classification (gender, ethnicity, education…)
- Compensation (pay type, frequency, rate…)
- Payroll & Benefits information
- Employment information (position status, DBDT (ORG) level, reports to…)
- Emergency contact information
- User (used to link new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

Each section is described below.

STEP 2: Fill out Employee Information

Profile section

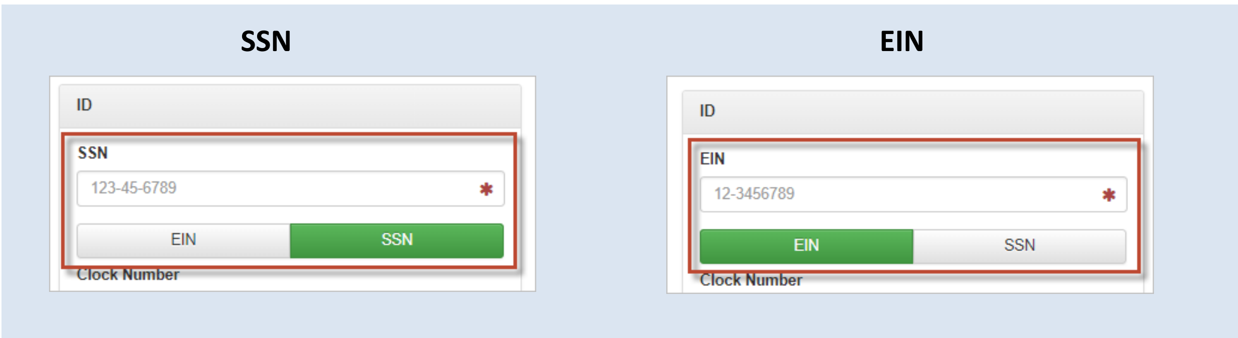
Enter the new hire's name, address, Social Security Number, birthdate, and email and phone contact information.



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

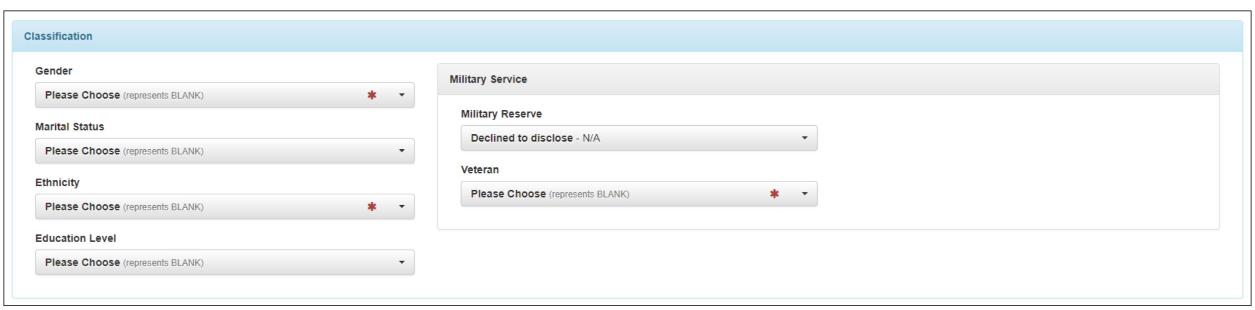
We have improved the system handling of 1099 Company/Employee Names and the **EIN/SSN** data collection during the add new hire process and during the onboarding process. This adds the ability to designate a 1099 Employee as an SSN or EIN.

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:



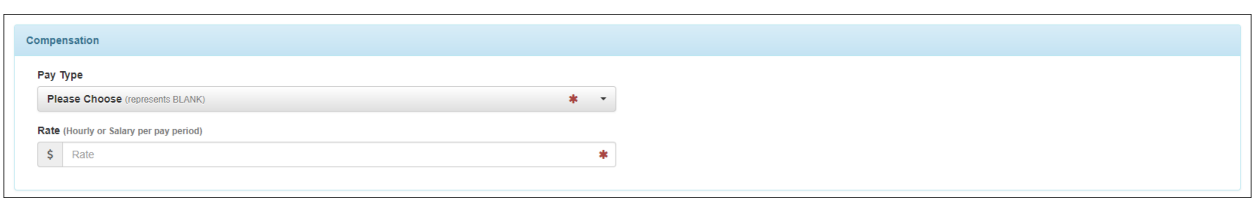
Classification section

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



Compensation section

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



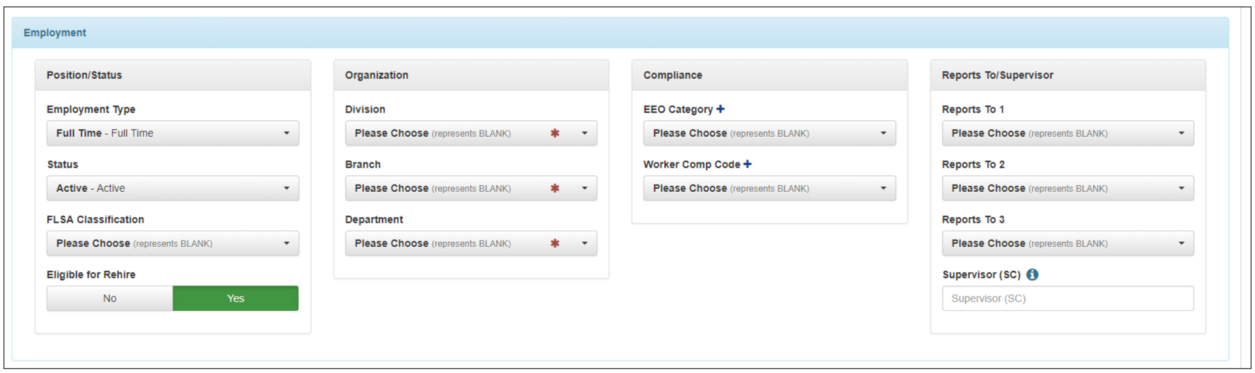
Some of these fields may default in from the Company Setup.

Payroll and **Benefits** sections

Complete the new hire's payroll and benefits information.

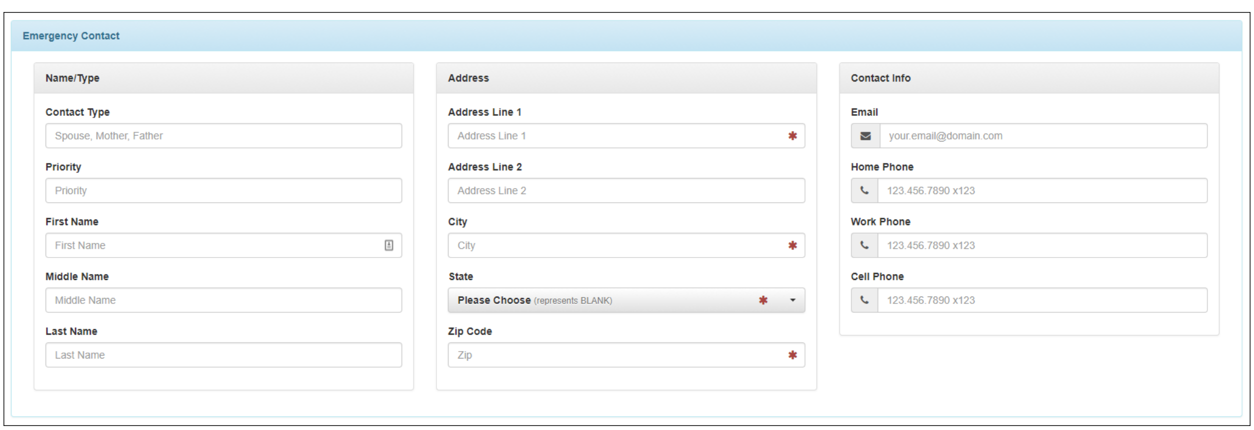
Employment section

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



Emergency Contact section

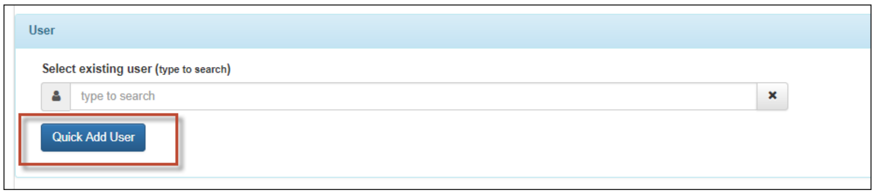
Complete the new hire's emergency contact information (contact type, name, address, email, and phone information).



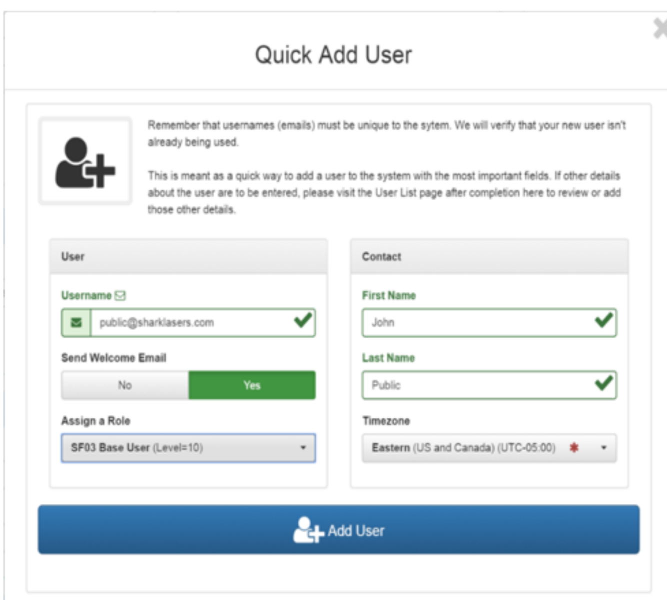
User section

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.

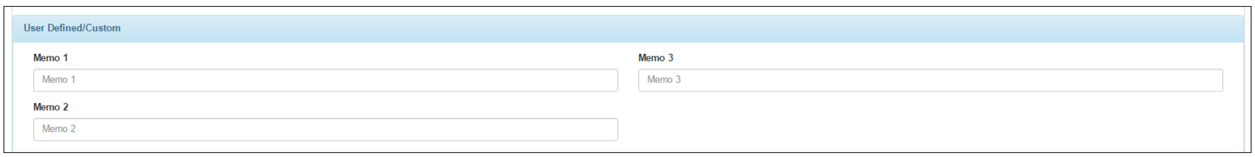
Click the blue **Add User** button when complete. You'll be taken back to the **Employee Summary** screen. Remember to click the green **Link User** button to link:

- 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.



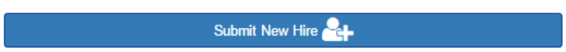
Integration section

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

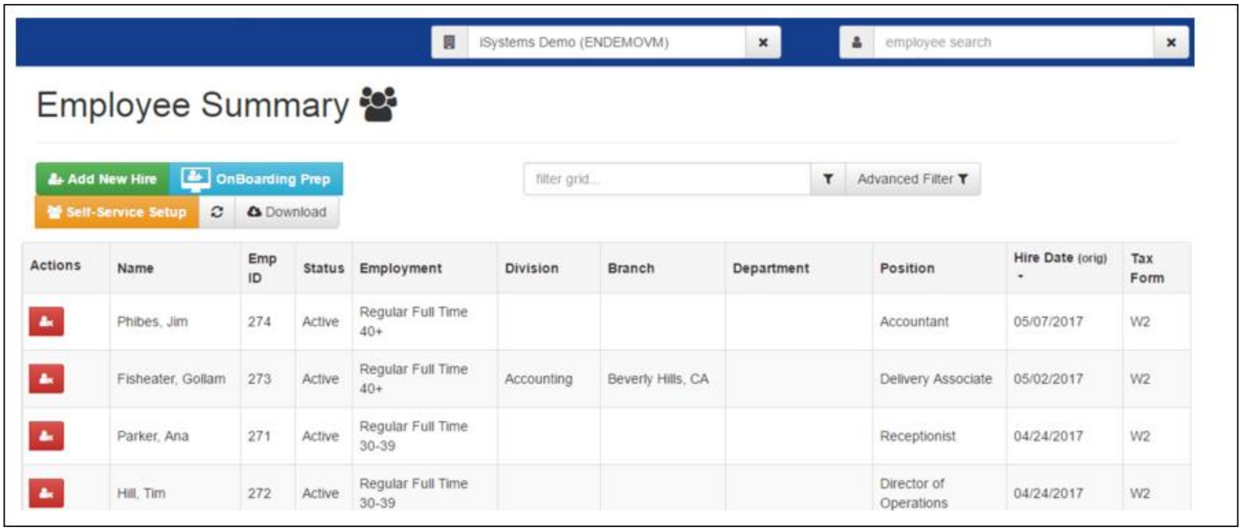
Save Options

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



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



Employee Summary screen

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

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

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

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

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

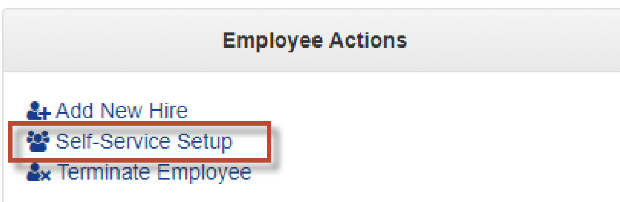
Self-Service Setup

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.

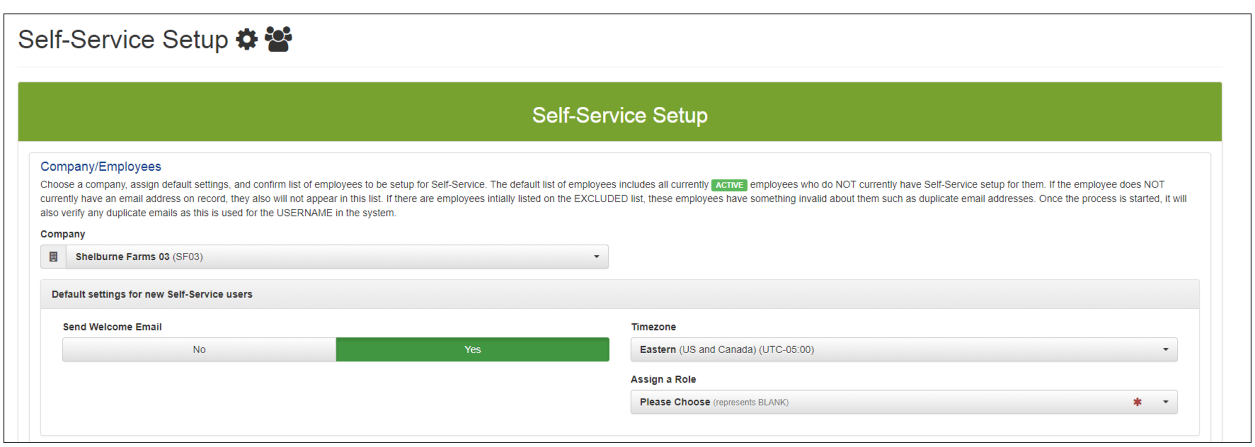
Advanced HR 2.0 will keep track of employees that have been onboarded, but have not yet been invited to Employee Self-Service functionality. By clicking on **Self-Service Setup**, the user can invite any number of employees to sign-in and access their Employee Self–Service Portal.

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



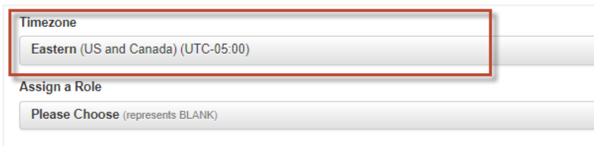
2. The system displays the **Self-Service Setup Dashboard**.

   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.

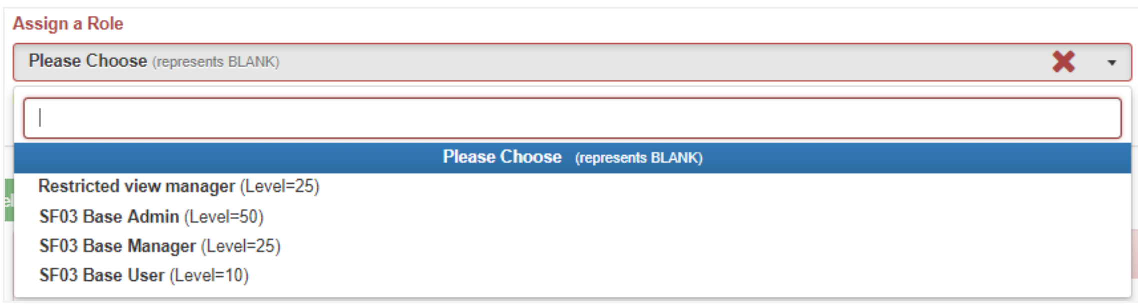


3. Select a **Company** (if one is not already selected) that you want to perform the Self-Service Setup for.
4. In the **Default settings for new Self Service users** section of the screen, you can use the **Yes/No** toggles to have a **Send Welcome Email**. If you set this to **Yes**, an email will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

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

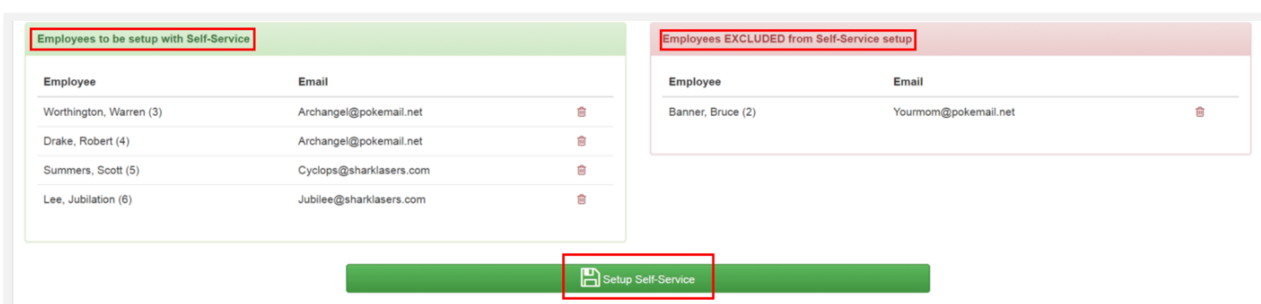


6. You can **Assign a Role** to the employee(s). Select a Role from the dropdown and that Role will be assigned to all employees that are involved in the Self-Service Setup.



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

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

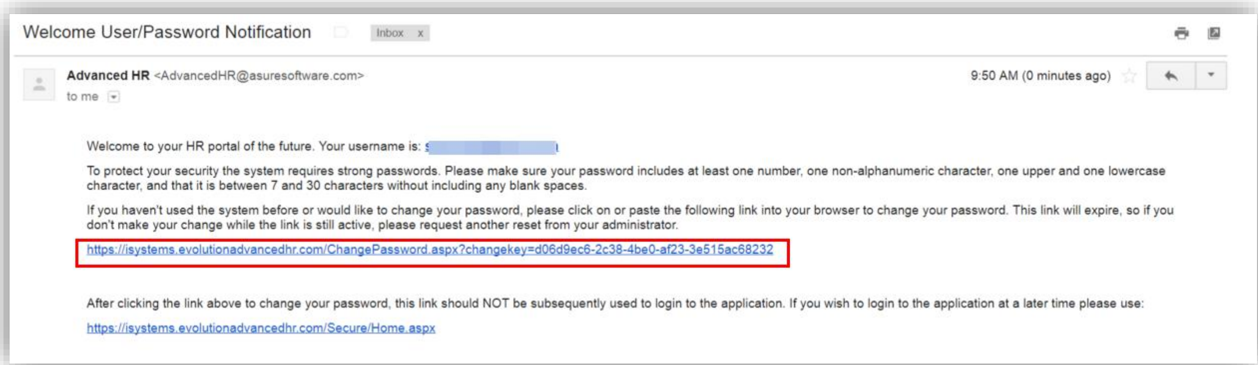


The default list of employees (**Employees to be setup with Self-Service** section shown on the left side of the screen) includes all Active employees who do not currently have Self-Service setup for them. If the employee does not currently have an email address on record, they will not appear in this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

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

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

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



Note: The email link on the Welcome Email sent to the employee 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:

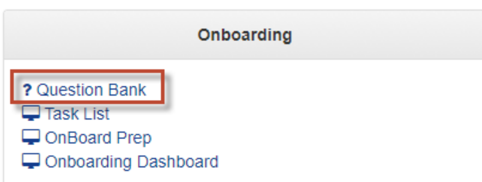
- By going to **HR Admin - Employee Actions - Self Service Setup**, the user can send a mass welcome email, with self-service instructions to *all new hires* that have not gone through onboarding yet. This task was described previously in the Self-Service Setup section.
- By going to **HR Admin – Onboarding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

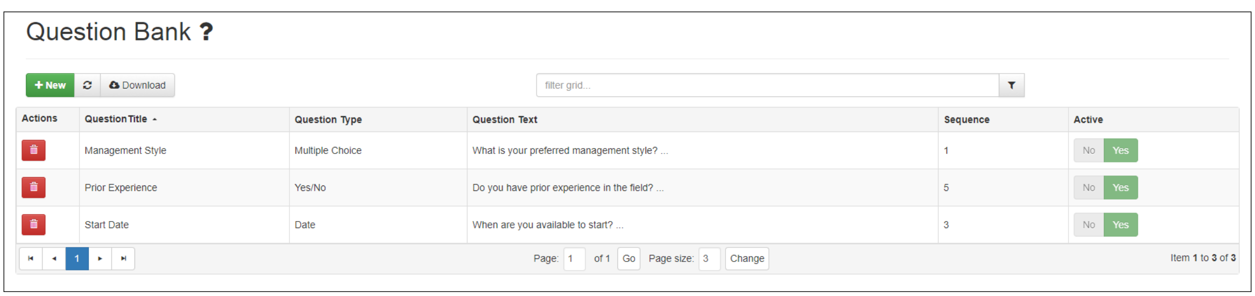
Once the welcome email is sent, the user can keep track of new hires through the **Onboarding Dashboard**.

Onboarding Question Bank

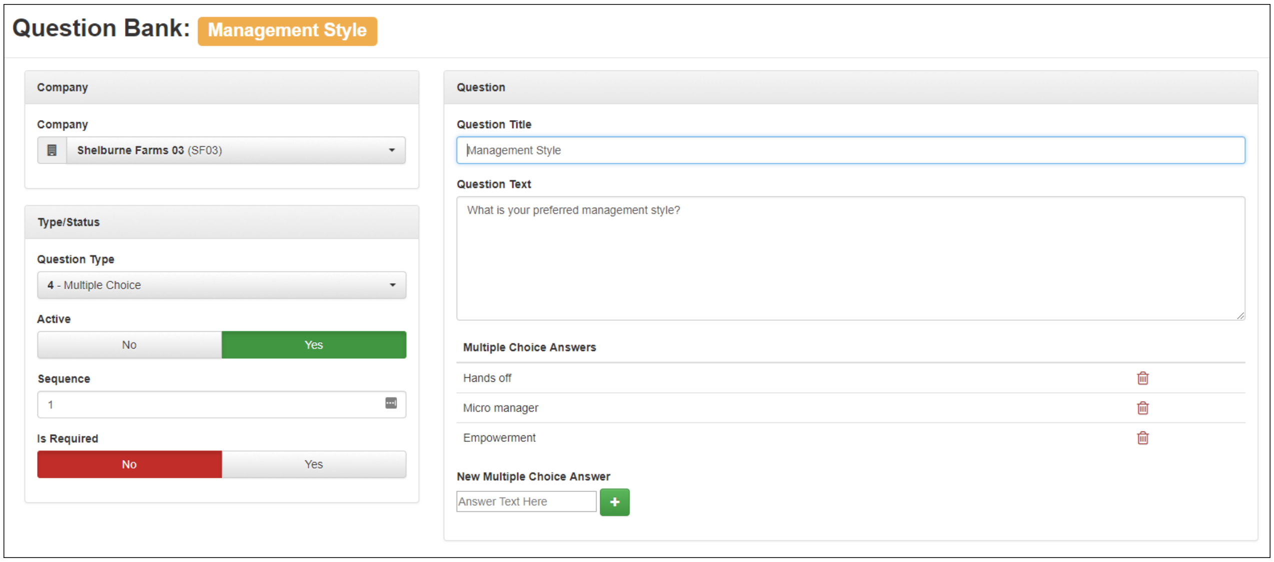
Custom questions can be added to the new hire onboarding process. Questions can be Yes/No, Free Form Text, Data, and Multiple Choice answers. Questions can also be used across multiple job postings.

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



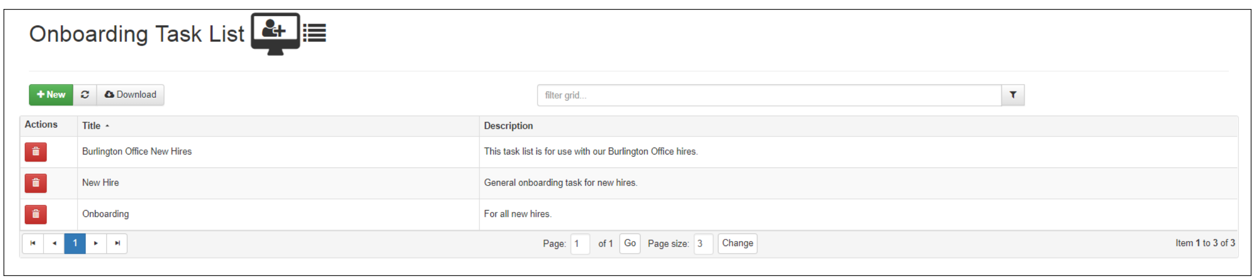


Click on a question row to see the Detail screen for that question.



Onboarding Task List

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



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

You also have the option to:

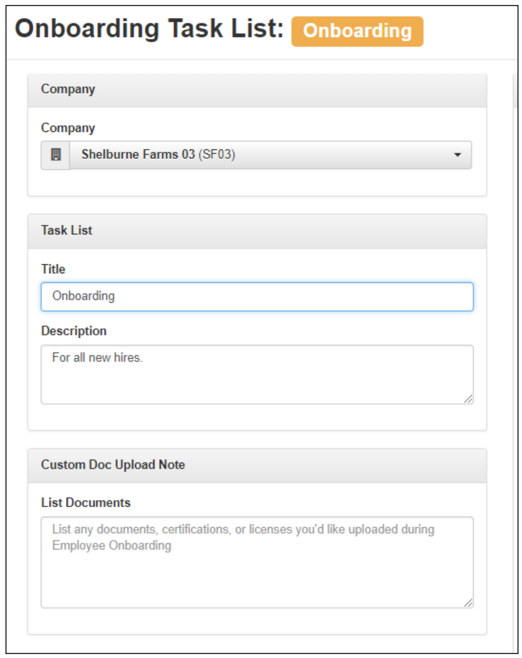
- View or edit a particular onboarding task by clicking on it
- Delete an onboarding task
- Create a new onboarding task

Onboarding Tasks can include:

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

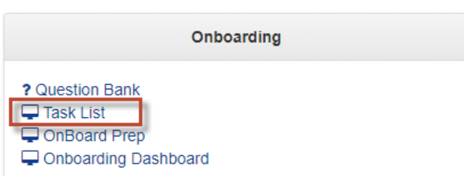
- A Background Check Authorization
- Company Documents (uploading of PDF’s)

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

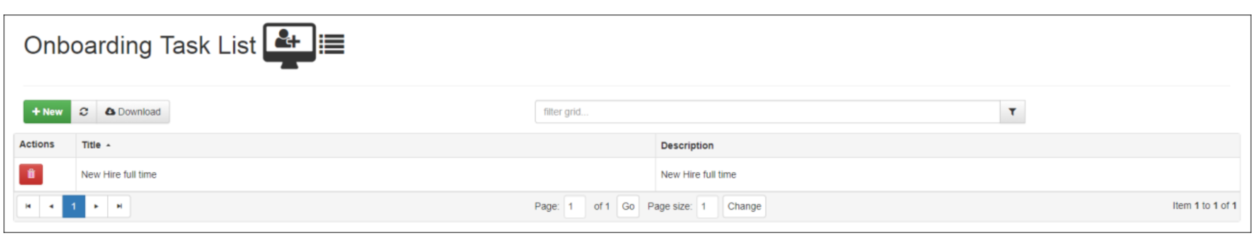


When setting up an Onboarding Task you have the ability to select a number of company tasks and documents to be used for onboarding.

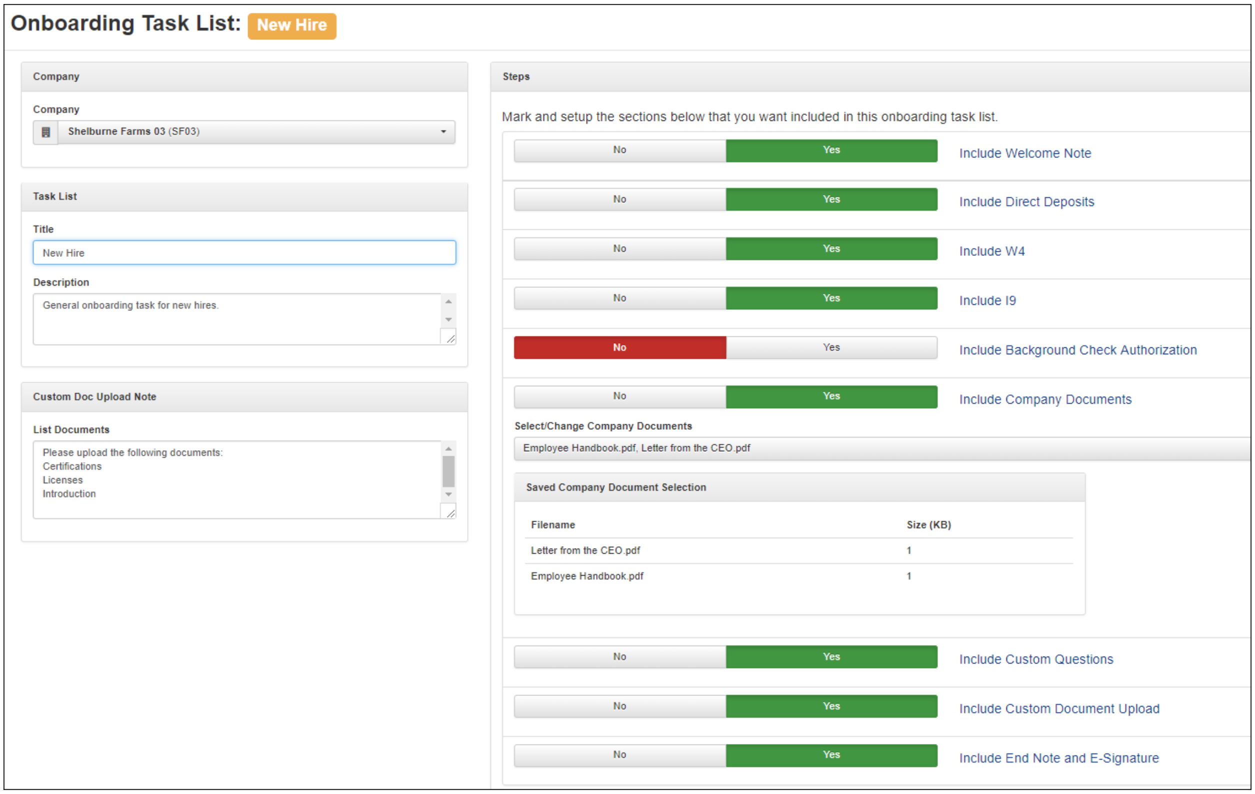
1. Go to **HR Admin – Onboarding – Task List**.

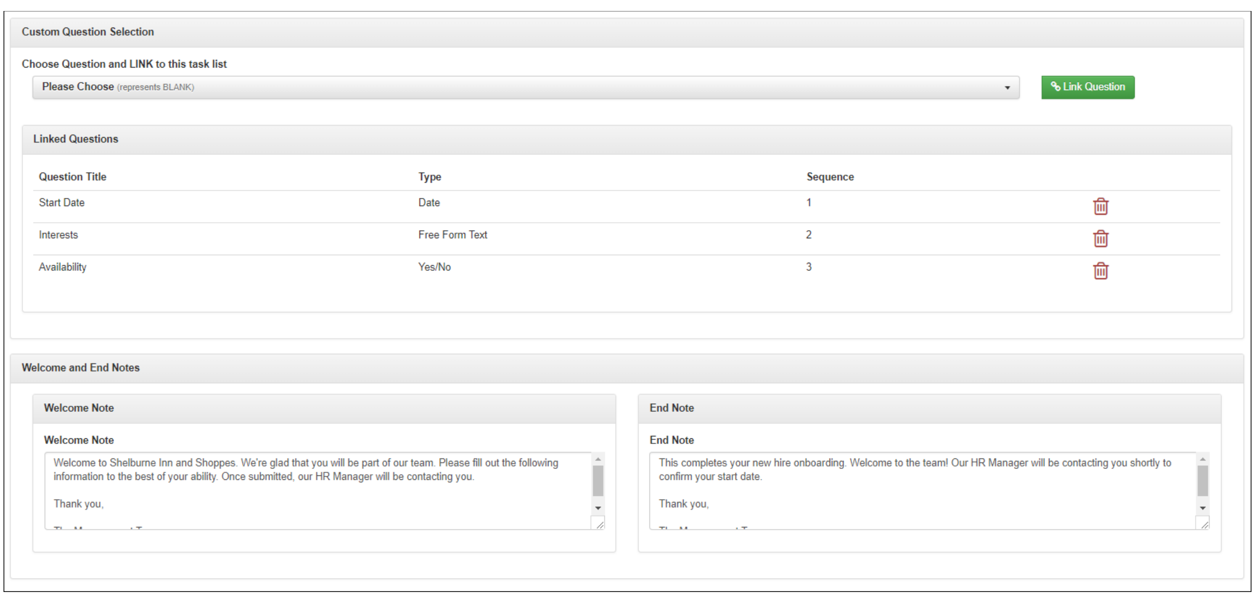


2. Tasks that have already been created are listed on the **Task List** summary screen. Click on a task to edit it.



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



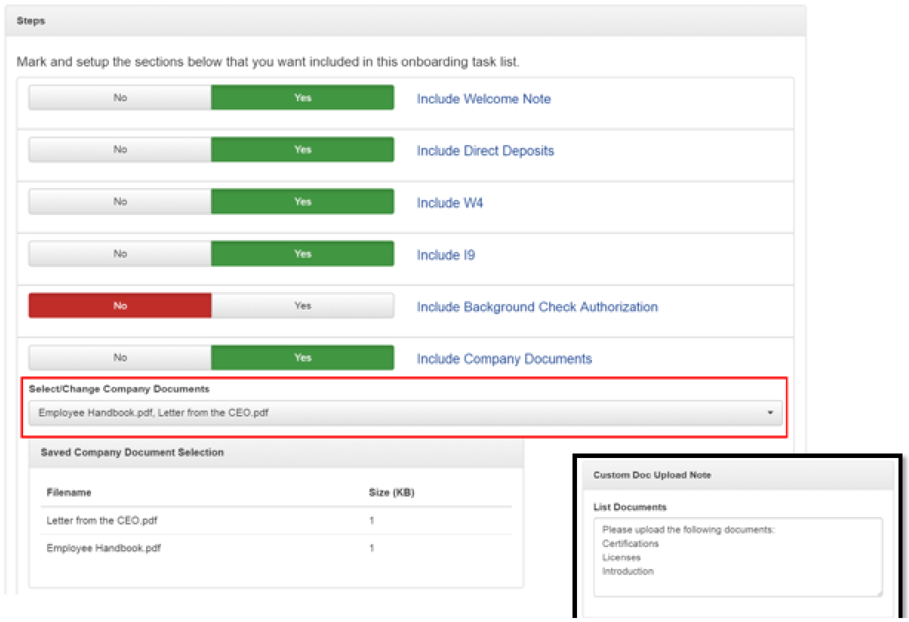


3. Select the **Company**, give the task a **Title** and optionally, a **Description**.

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

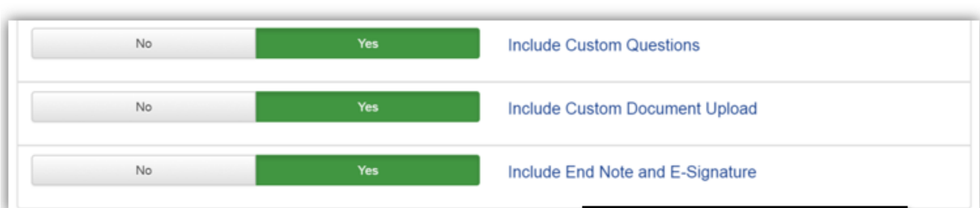
You can also create the **Steps** to be included.

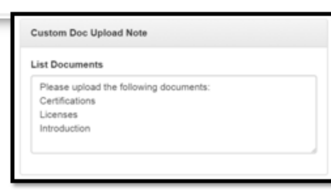
Remember to **List the Documents** you'd like the new hire to upload.



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

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





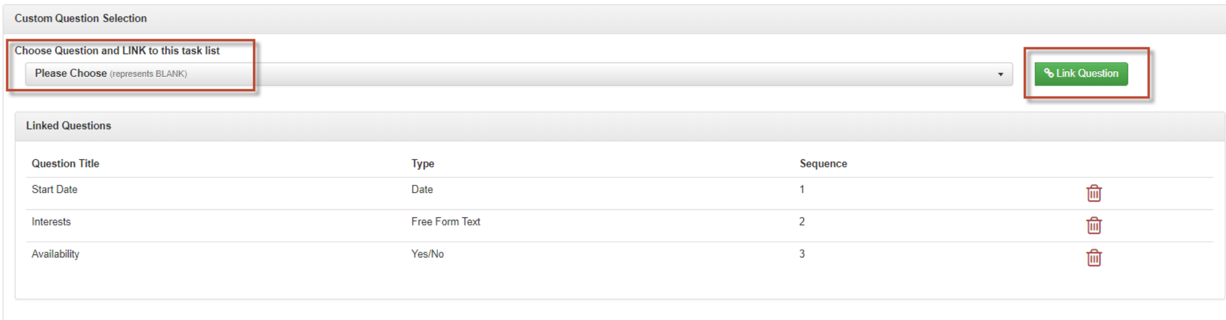
Using the **No/Yes** toggles, you can also include:

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

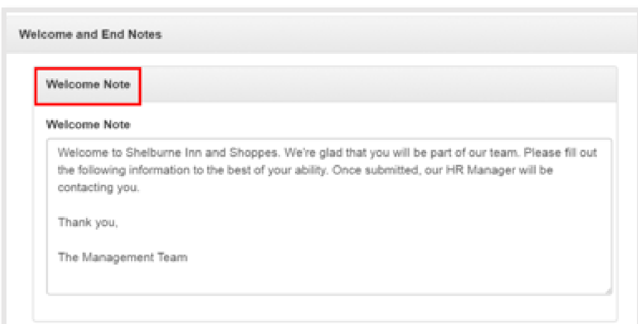
To add Custom Questions, go to **HR Admin - Onboarding Question Bank**.

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

- Availability
- Special interests
- Needs for success

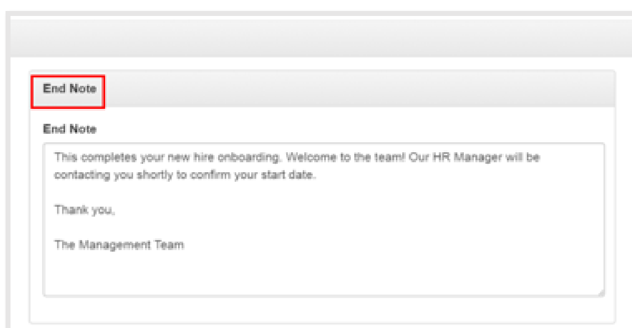


Welcome Note and End Note



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

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



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

Once the Onboarding Task has been created, it can be used when you prepare (prep) an employee for Self Service Onboarding.

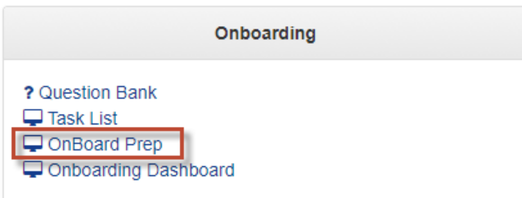
The next sections discusses the actual self-service onboarding process in detail.

Using Onboarding Prep to Start Self-Service Onboarding

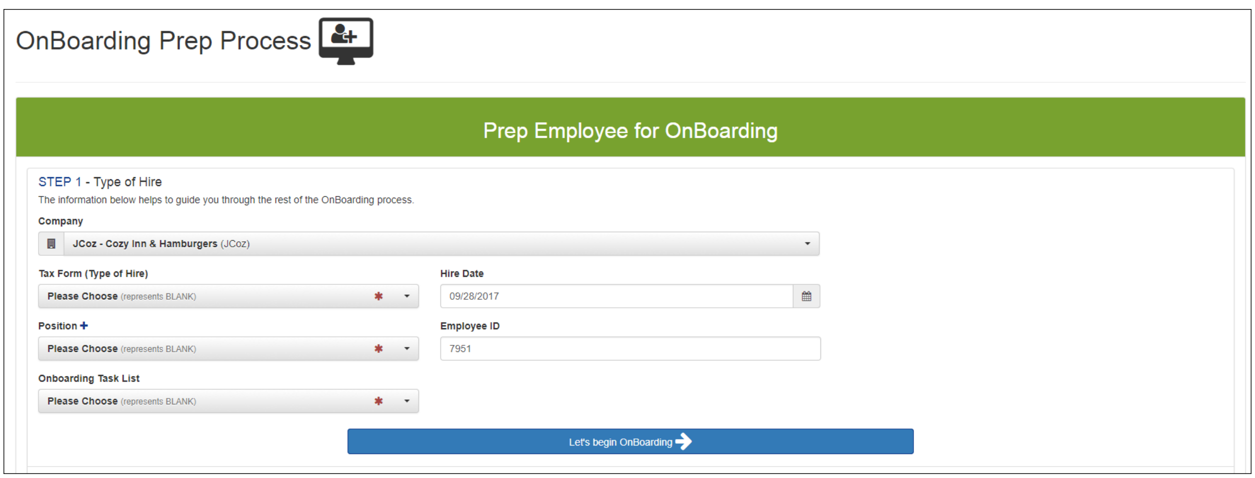
To start a Self-Service Onboarding, the first place you go to is **Onboard Prep** to begin the onboarding process and get the new hire's preliminary information into the system. With Onboarding Prep, the user will fill out the basic information and the new hire will complete it.

This section describes how to perform the Onboarding Preparation Process for a new hire employee.

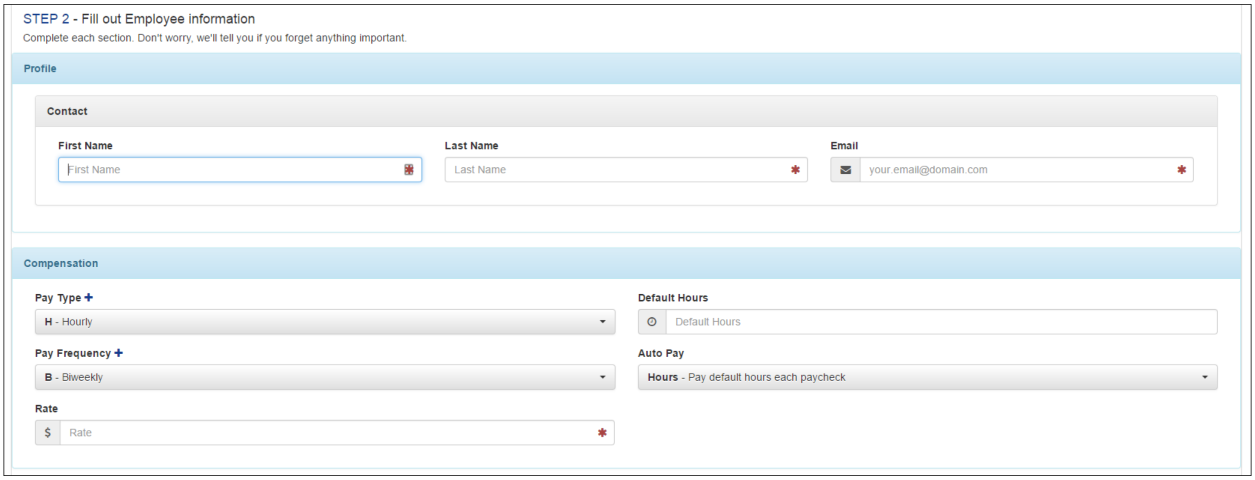
1. Go to **HR Admin – Onboarding – OnBoard Prep**.



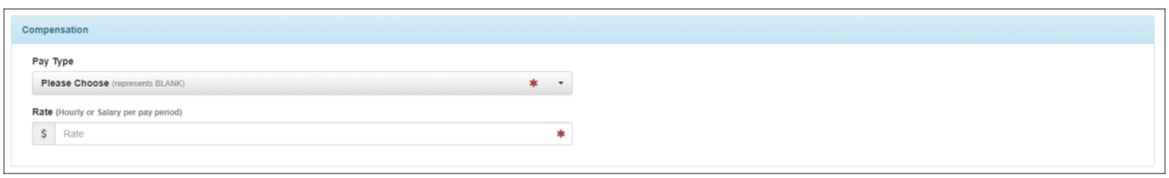
2. The system displays the **Employee Onboarding Prep** screen.



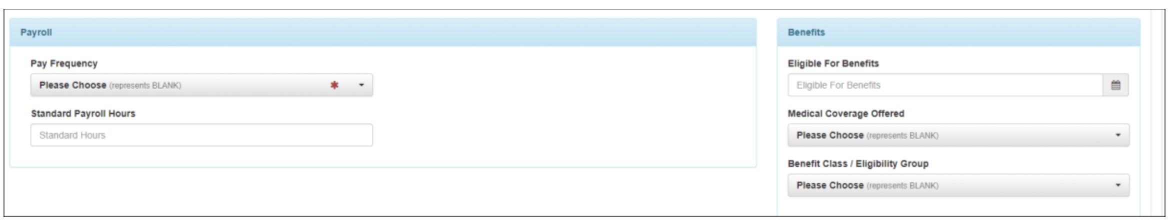
3. Enter the basic employee preparation information, if not already entered. Note that the **Tax Form**, **Position**, and **Onboarding Task List** are required fields. Remember, the Task List includes the steps that you want the new hire to complete, or documents that you want them to sign off on, before 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.



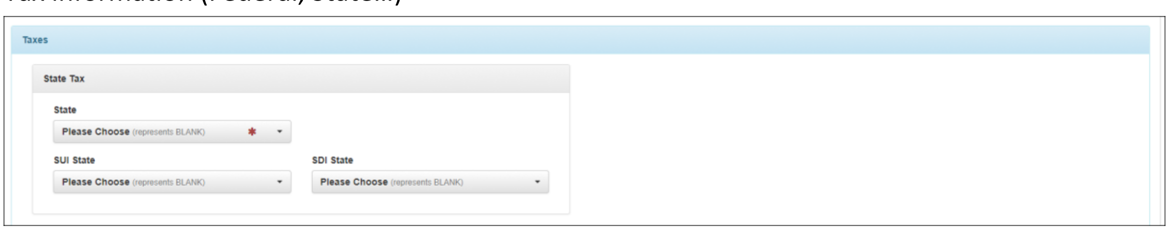
5. Enter the following information. Refer to the screenshots earlier in this document for section by section screenshot examples:
   - Profile information (name, address, SSN…)
   - Compensation information (pay type and rate)



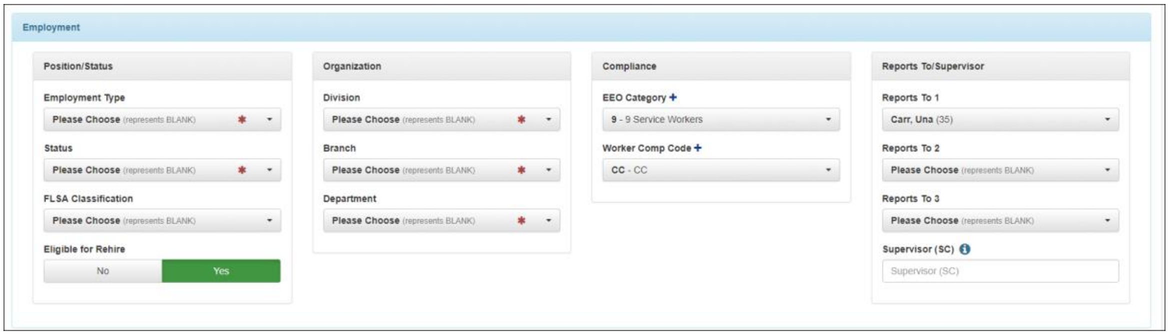
   - Payroll and Benefits information



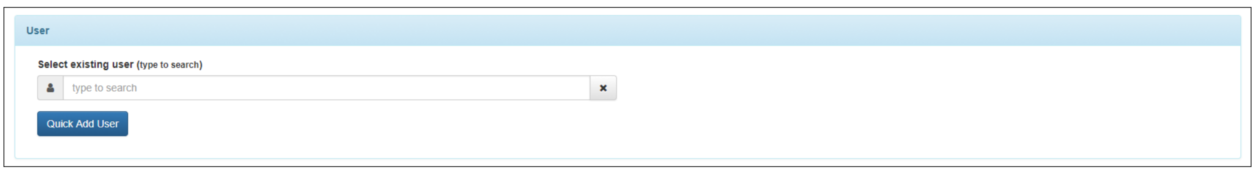
   - Tax information (Federal, State…)



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

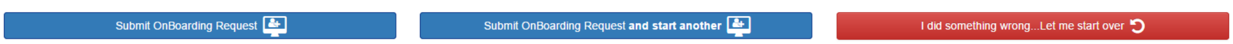


- **User** information. (A new hire must also be set as a user in the system for security purposes.) While the User field is not required, it is recommended.
  - Or, by using the **Quick Add User** function, you can quickly add a user – create a username (email address) and assign them a role for security rights access to the system. Click the **Quick Add User** button.



- User defined custom fields (use to create up to three custom fields).

6. Click the **Submit OnBoarding Request** button at the bottom of the screen when complete:

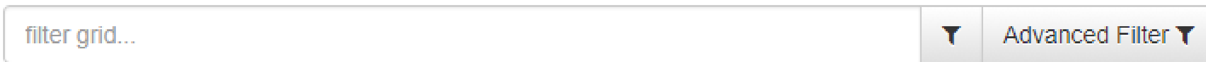


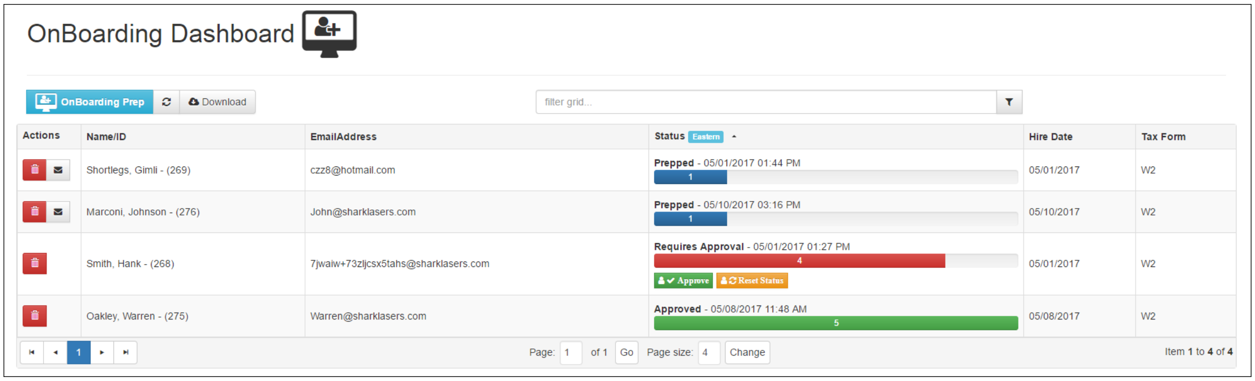
Note: Remember that usernames (emails) must be unique to the system. Advanced HR 2.0 will verify that the new username isn't already being used. **Quick User Add** is meant as a fast way to add a user to the system with the most important fields. If other details about the user are to be entered, go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

The new hire is now prepped.

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.





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

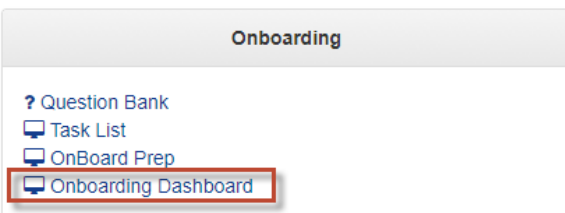
The new hire will need to e-sign each before they can proceed to the next section.

Manager/Admin Reviews and Approves the New Hire

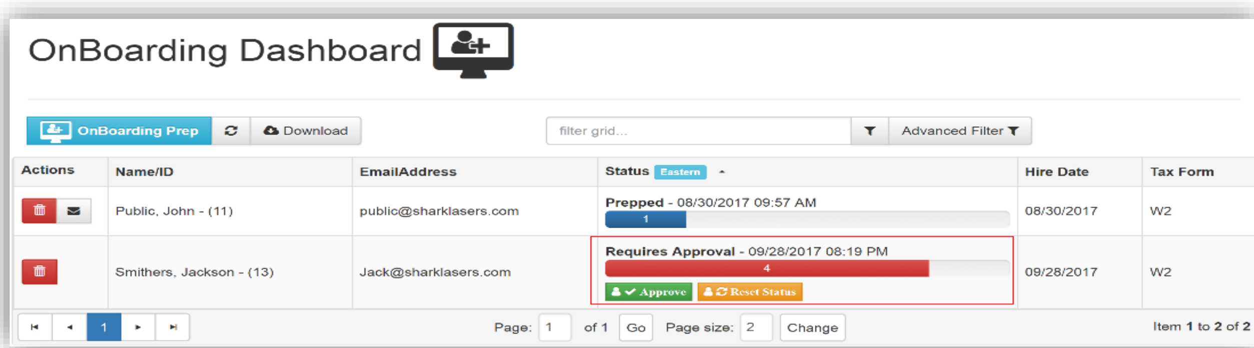
For the Manager/Admin, they will need to use the Onboarding Dashboard to review and approve the new hire.

To display the Onboarding Dashboard:

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



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

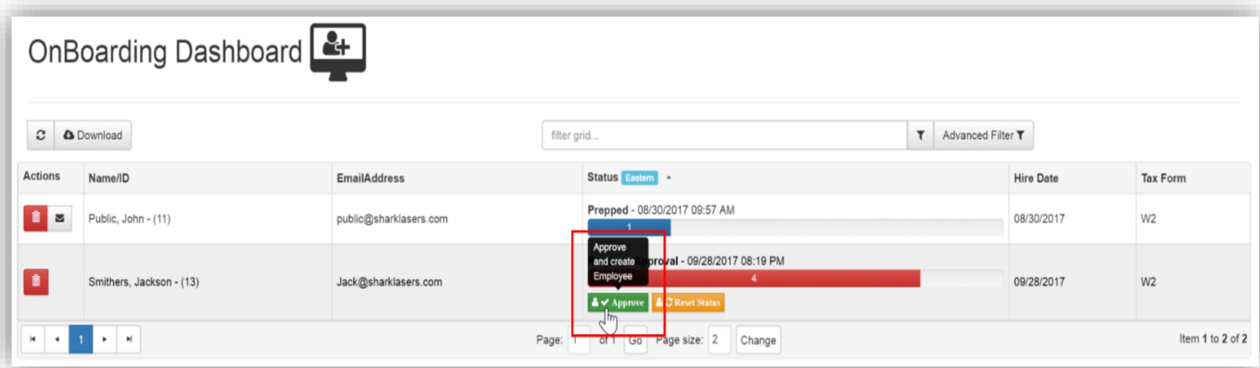


From the Onboarding Dashboard summary page you can:

- 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.

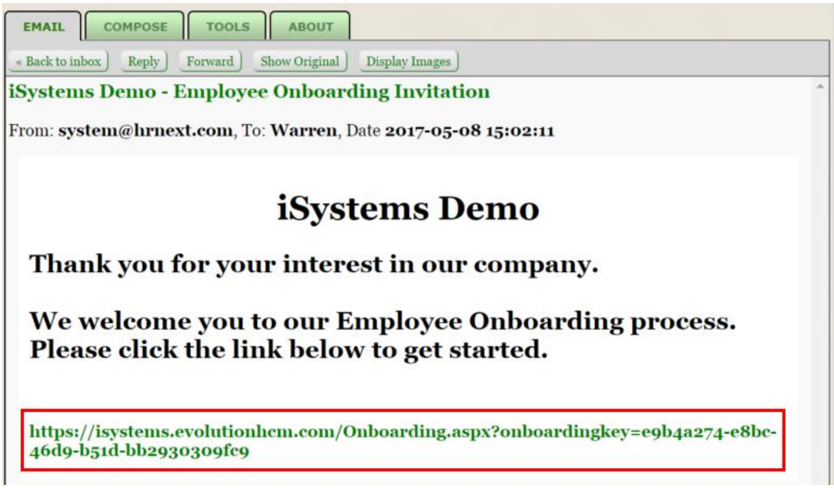


- Reset the **Status** back to **Started** for an employee whose **Status** is **Requires Approval** by clicking the **Reset Status** button 

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:

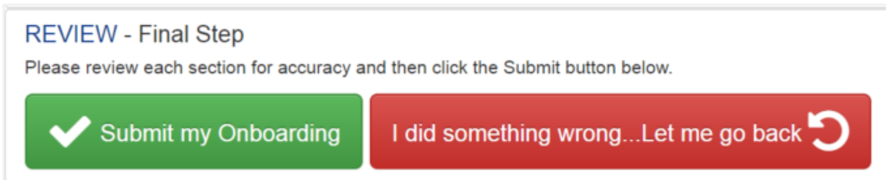


When the link is selected, the employee will be taken to following screen to begin the Onboarding process:

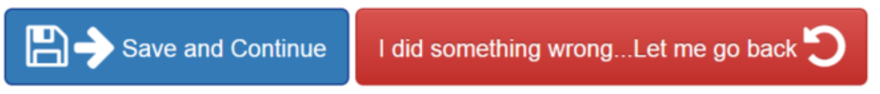
The employee will be walked through completing their pertinent information. Remember, this information was defined in the **Onboarding Task List**:

- 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:

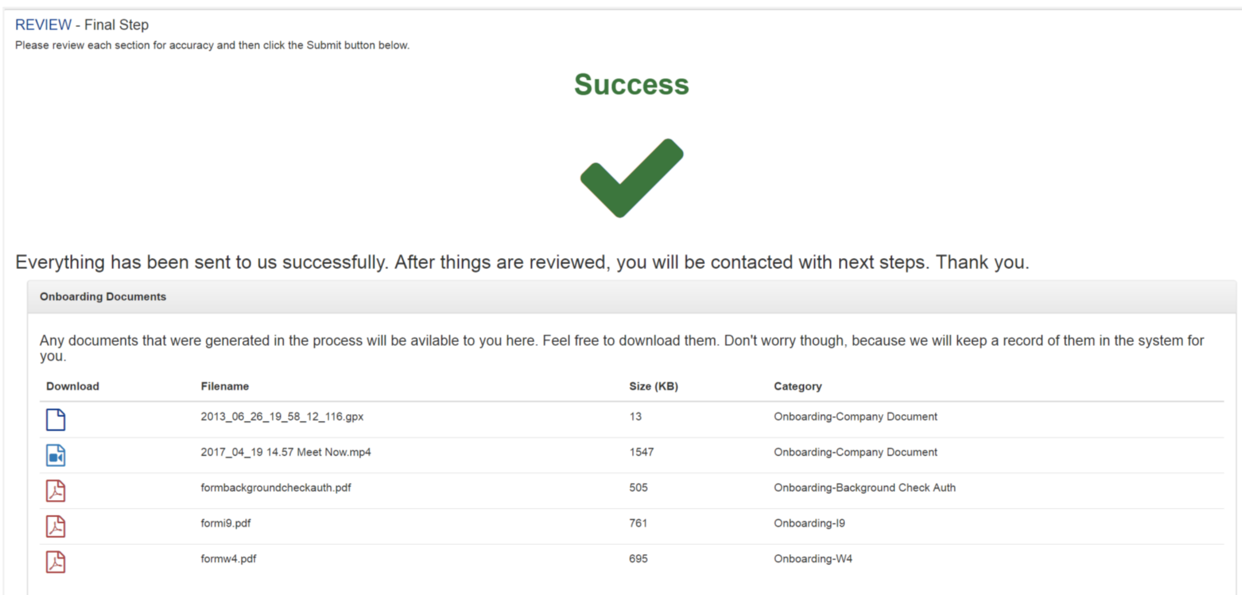


Note: After each task is completed, the employee selects the **Save and Continue** button to proceed:



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.

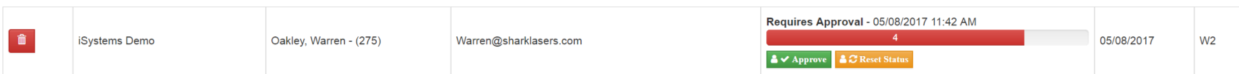
Onboarding Documents

Any documents that were generated in the process will be avilable 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.

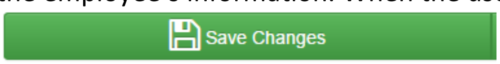


Note that we recommend that you use the **Quick Add User** feature. This allows you to create a User in the system so that when they are eventually onboarded, they will already be in the system as a user and ready to go. Make sure that the **Send Welcome Email** toggle is set to **Yes** and that you **Assign a Role**.

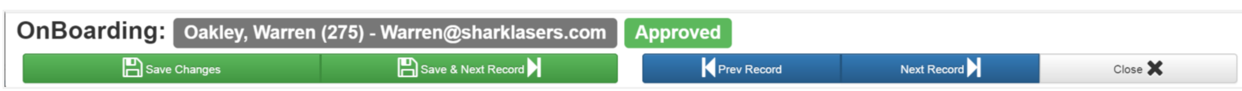
The role you assign will determine the new hire's level of access. Click **Add User** when complete. An email will be sent with details on how the new hire can access the system. Remember to click **Save Changes** before you return to the Onboarding Dashboard.

Clicking on the **Approve** button 

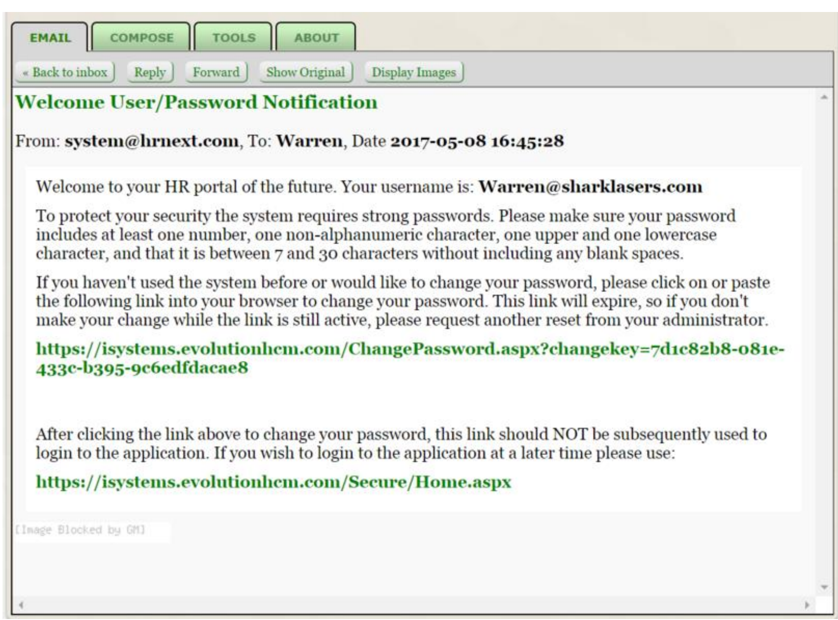
will allow the HR Administrator to review and approve the employee's information. When the user is satisfied, they click **Save Changes**.



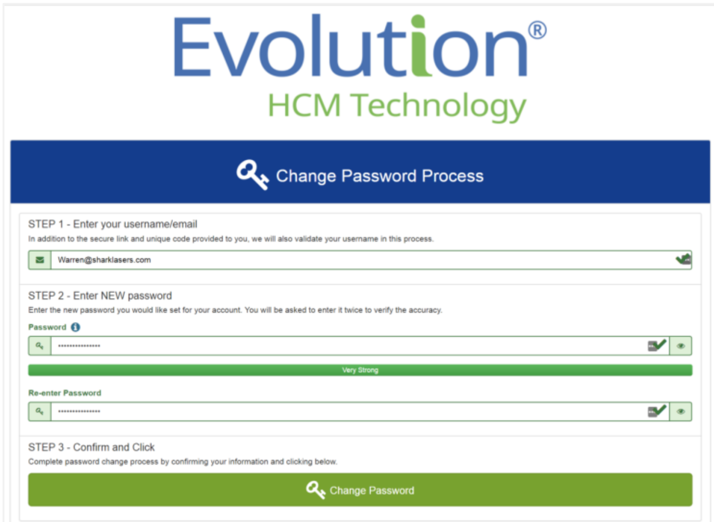
The employee is now fully Onboarded.



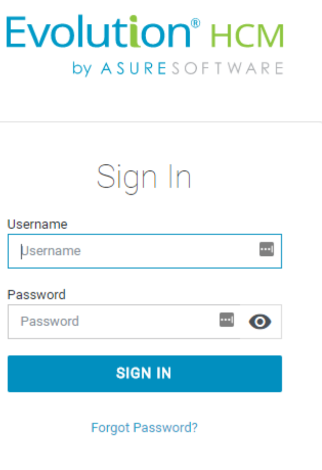
Once onboarded, the employee will receive a Welcome User/Password Notification email similar to the following sample. This email provides the login information for the new employee:



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):

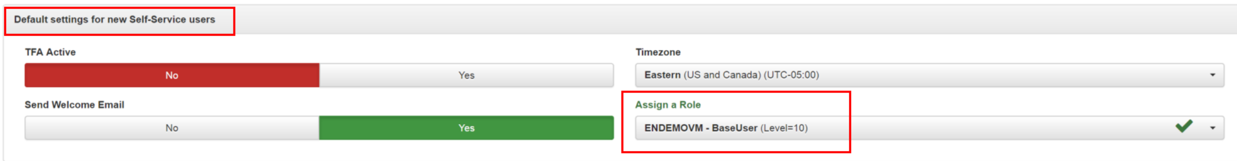


Once **Change Password** is selected, the employee will be taken to the Advanced HR login screen:



The employee's view is based on their assigned level of access in Advanced HR 2.0. In our example, Warren was given the "**BaseUser**" access level.

Note: Access level can be changed, but its default settings for new employees is set on the **HR Admin – Employee Actions – Self-Service Setup** screen.

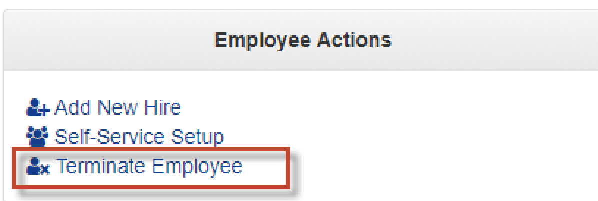


Terminating an Employee

Terminating an employee is a simple process in Advanced HR 2.0. You must have security access to do so – this includes **Super Admins**, **Service Bureau Admins**, and **Base Admins**. You can only terminate an Active status employee.

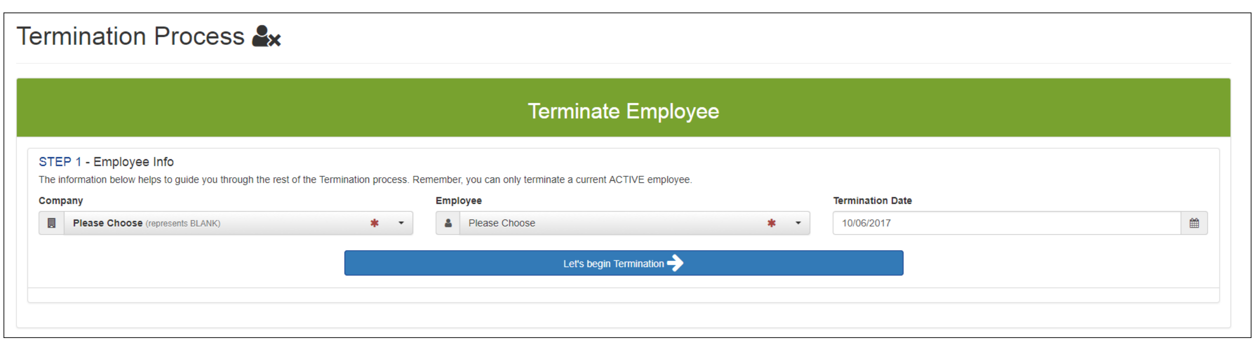
To terminate an employee:

1. Go to **HR Admin – Employee Actions – Terminate Employee**.

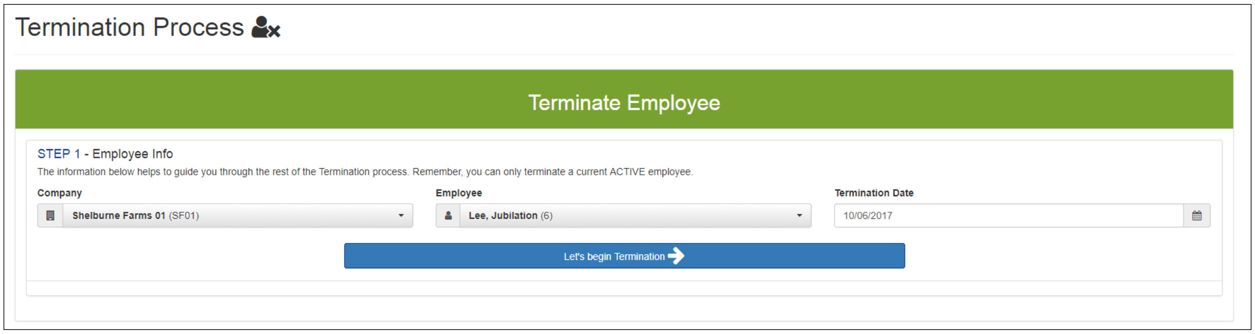


Note: Terminating an employee can also be accessed from the **Quick Links** screen.

2. When the **Terminate Employee** option is selected, the system displays the **Termination Process** wizard. This wizard will walk you through the process of terminating an employee.

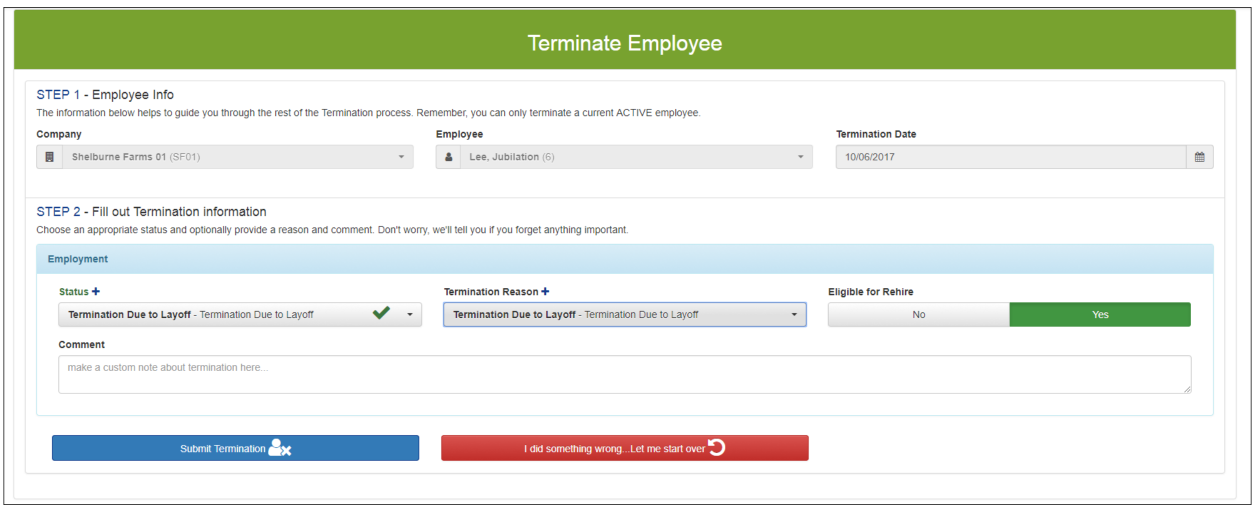


3. In **Step 1**, select the **Company**, the **Employee**, and the **Termination Date**. The **Termination Date** will default to the current date. However it can be changed by selecting the calendar icon.

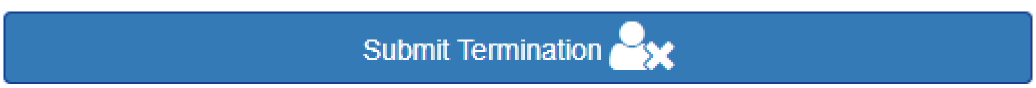


4. Click the **Let's begin Termination** button.

5. In **Step 2**, select the **Status, Termination Reason,** and if the employee is **Eligible for Rehire**. You can also add any comments in the **Comment** editable field.



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

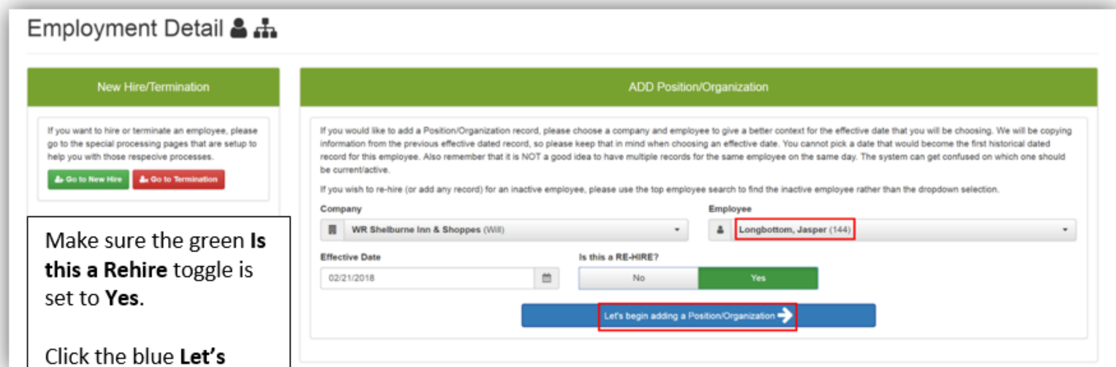


Note: After Terminating the employee, remember to adjust their **User Security Role** accordingly. Go to **HR Admin – Company - User List**. Click on the user. If, for example, they were a Base Manager, that level should be removed so they only have access as a Base User. If you choose, you can also **delete** or make them **inactive** as a user.

Rehiring an Employee

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**:

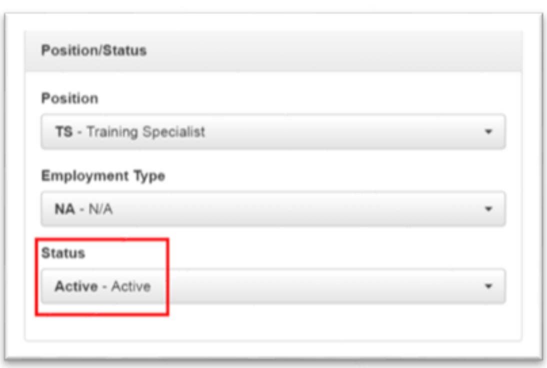
If the employee is Eligible for Rehire, go to the **HR Admin - Employee Maintenance - Employment Detail**. Since you are locked in, the employee's name will appear in the **Employee** dropdown:



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

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

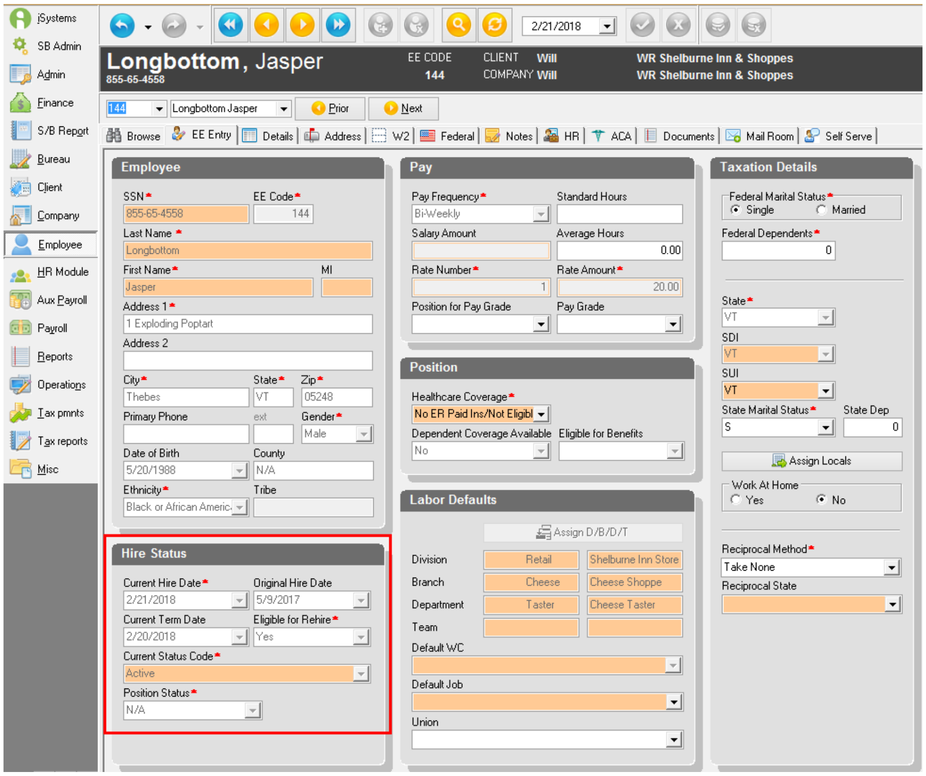
Set the **Is this a Re-Hire?** toggle switch to **Yes**.



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 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.

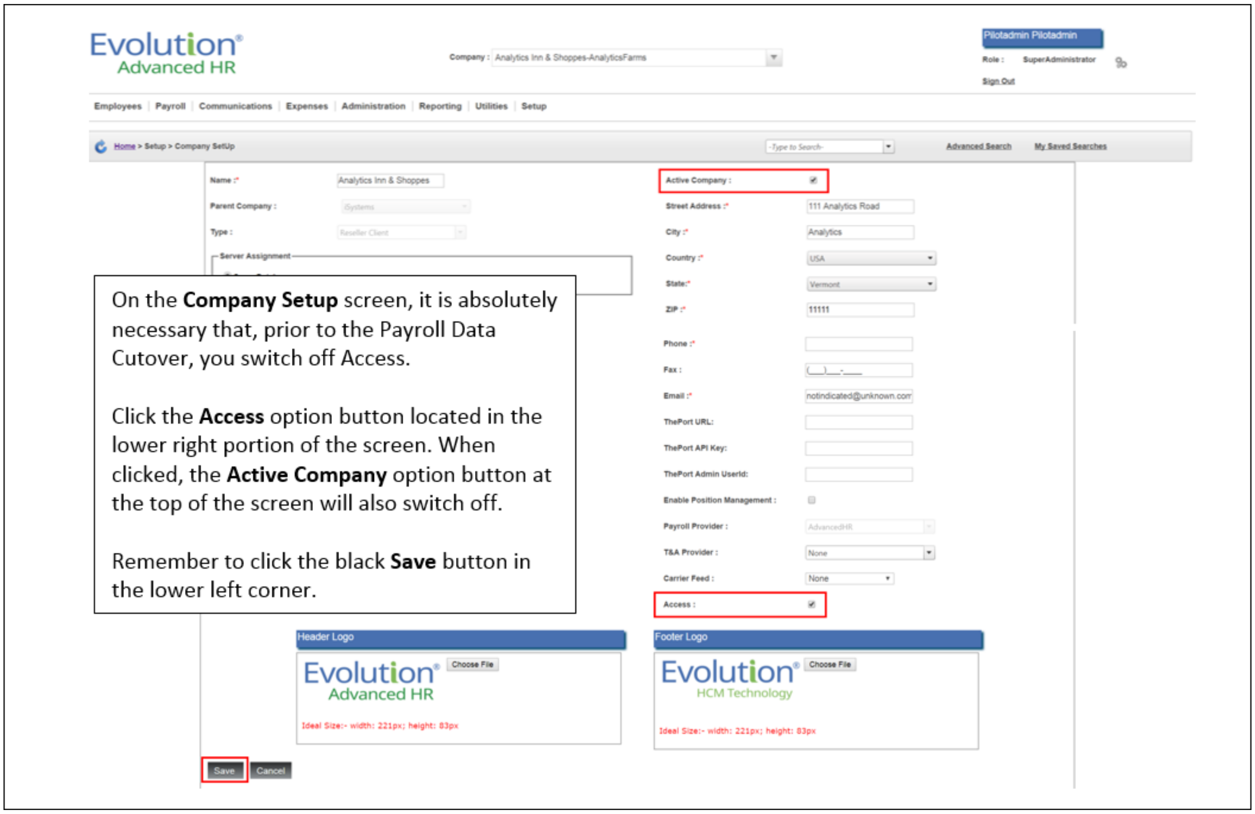
The **Data Migration Tool** feature enables the Admin user to migrate selected company and employee information from Advanced HR 1.0 for companies which were on it prior to the company Payroll Data Cutover into Advanced HR 2.0, or, for companies from this point forward which go through the **Payroll 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.

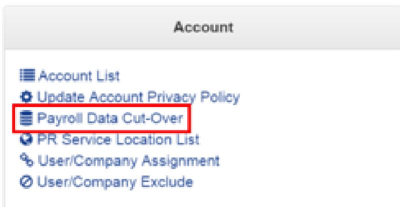


Turning Off Access to the Company in Advanced HR 1.0

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:

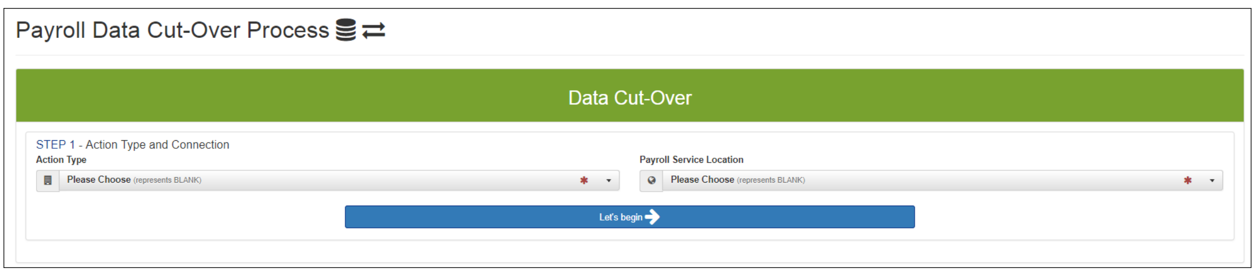


You'll be taken to the **Data Cutover wizard**. This wizard will walk you through the simple process of onboarding a company from Evolution Classic to Advanced HR 2.0.

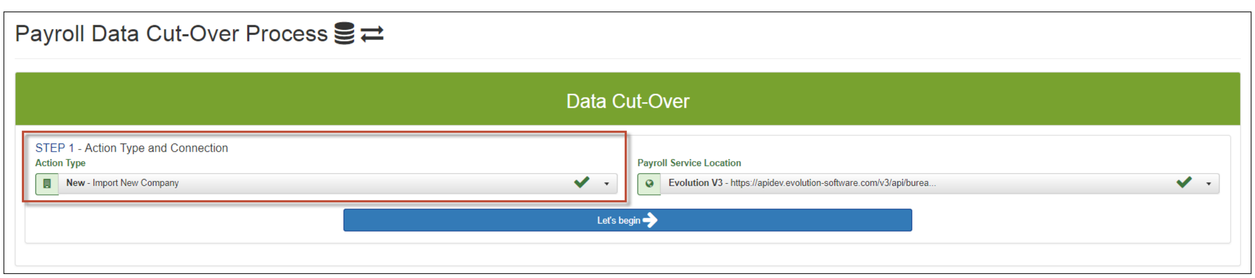
1. Go to **HR Admin – Account – Payroll Cut-Over**.

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

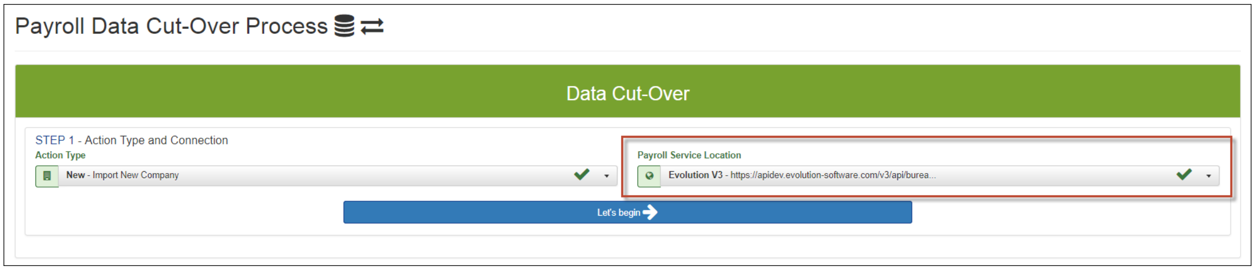
2. The system displays the **Payroll Data Cut-Over Process** screen.



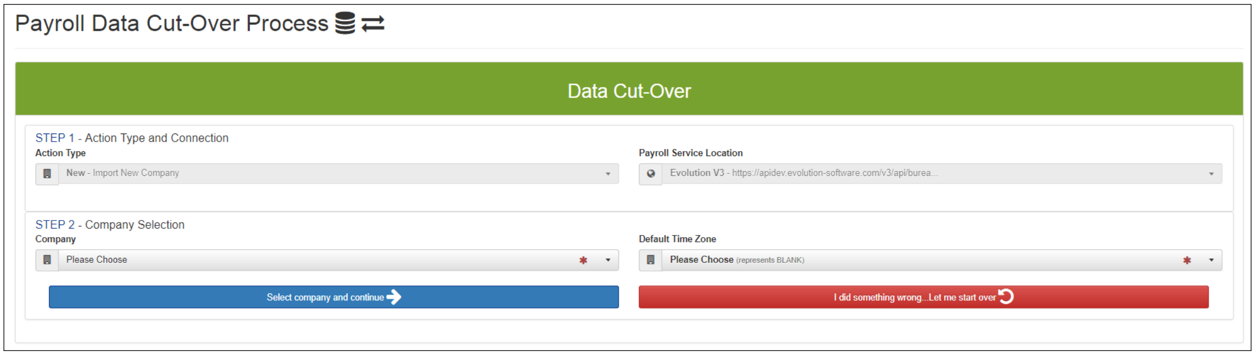
3. In **Step 1, Action Type**, select an **Action Type** of **New – Import New Company**. This should be the only choice. Select it.



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.

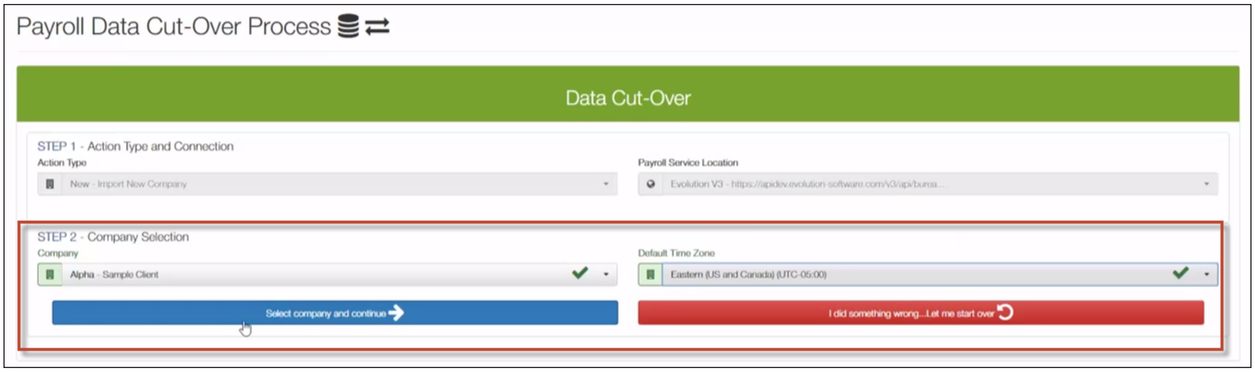


5. Click the **Let's begin** button to start the Payroll Data Cutover process.
6. The system displays the **Step 2 – Company Selection** section.

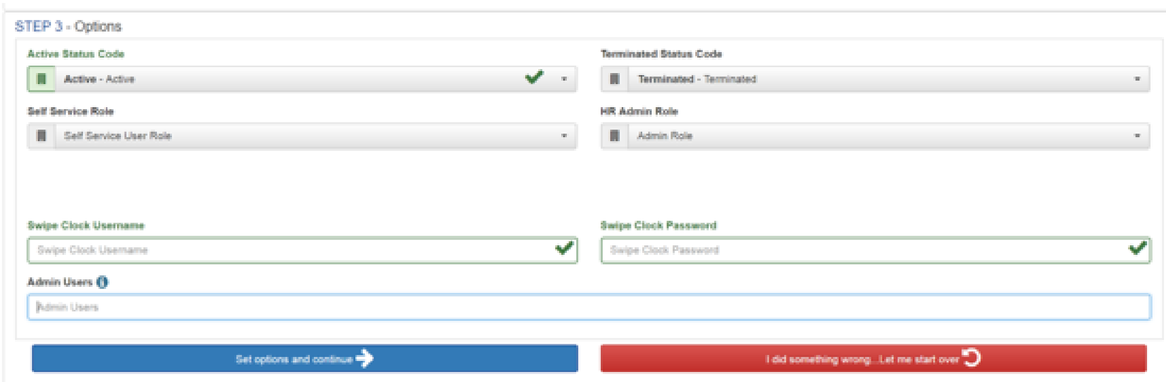


7. Select the **Company** that you want to onboard from your Evolution database.

   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.



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*.

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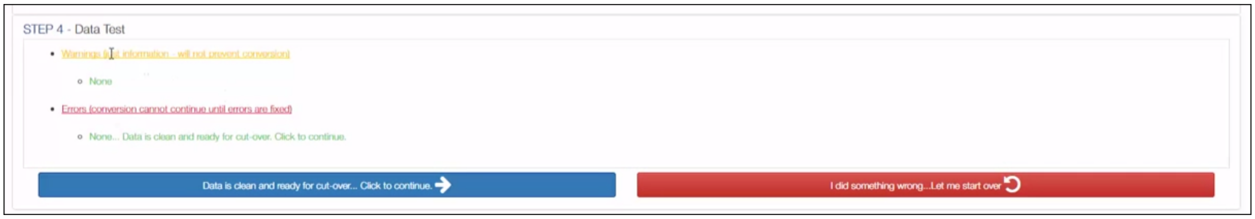
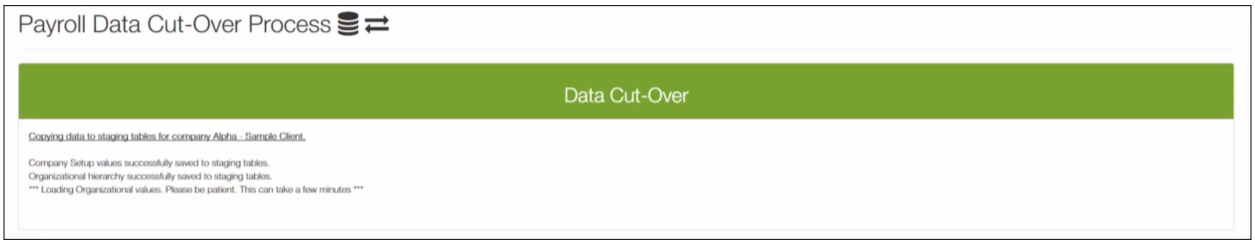
12. Once you select the appropriate options, click the blue **Set options and continue** button.
13. In the **Step 4 – Data Test** section, click the **Test Source Data** button.

   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.

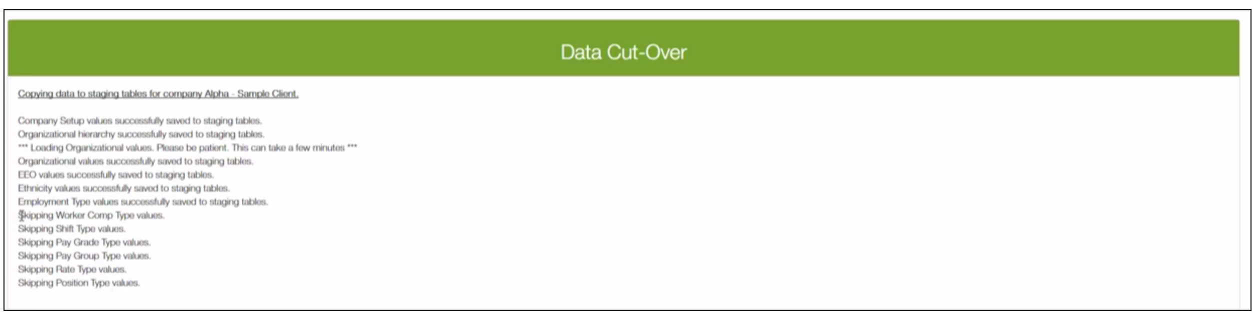


14. If there are no problems with the data, click the **Data is clean and ready for cut-over Click to continue** button. This will start the Payroll Data Cutover process.
15. The data starts moving from Evolution into the staging tables and then into Advanced HR 2.0, the progress is shown on the screen.



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.

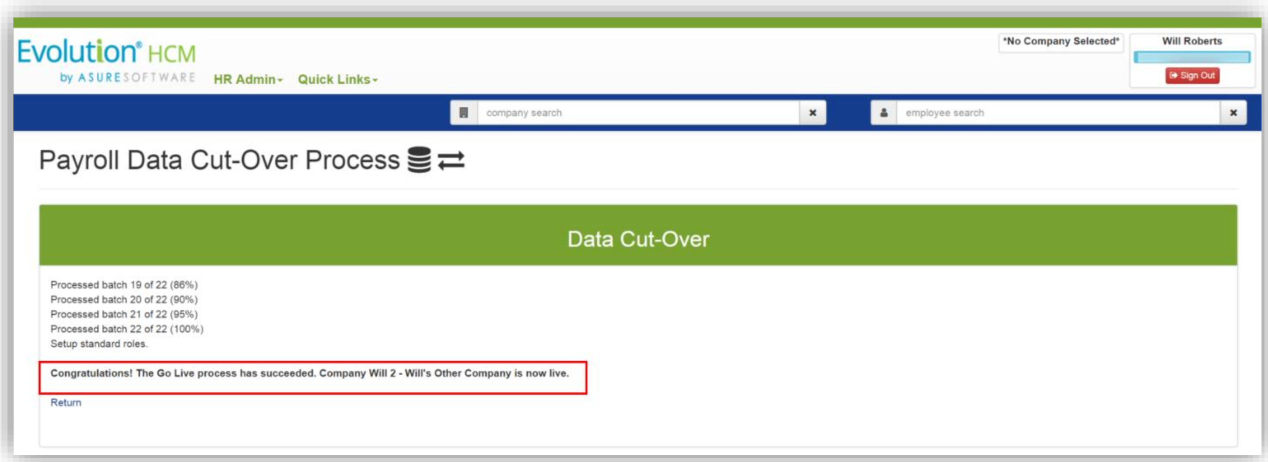
Note that the Best Practice is start small. Your first cutover should be with a company of no more that 1 to 2 dozen employees.



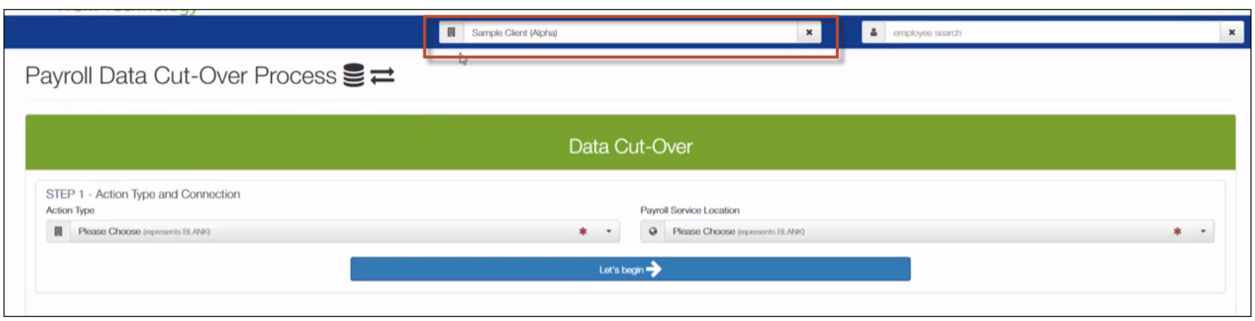
When done, the system displays a "Congratulations. The Go Live process has succeeded. Company NNNNN is now live" message.

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.

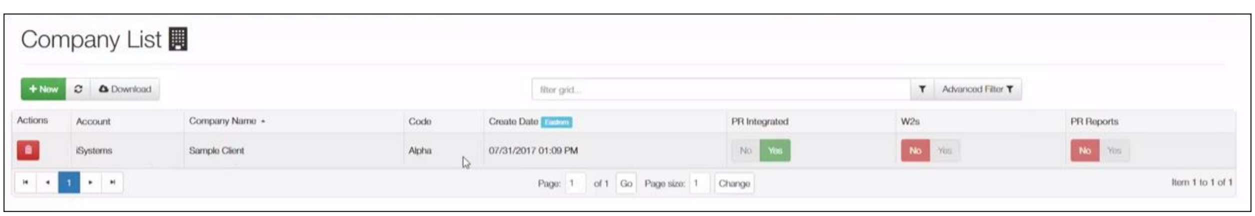
Note: Once the Payroll Data Cutover is complete, the company is now available for access in Advanced HR 2.0 and can be edited.



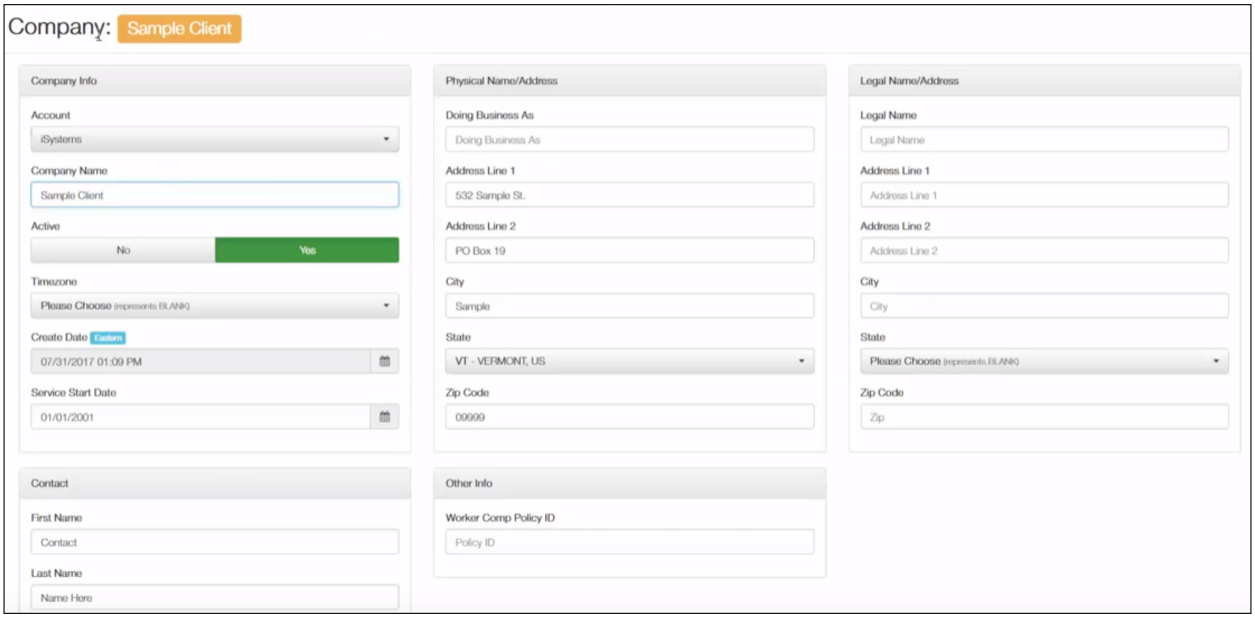
If you then go to the company search field at the top of the screen, you can now search for the company you just onboarded (Sample Client Alpha) in our example.



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.



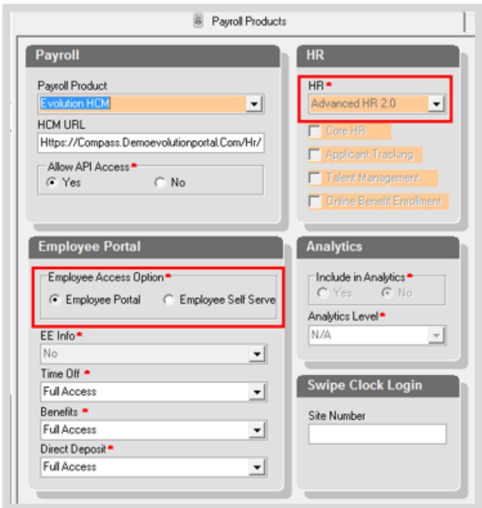
You can go to **HR Admin – Company Structure – Division / Branch / Department / Team** screens to see the company structure details.

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.



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

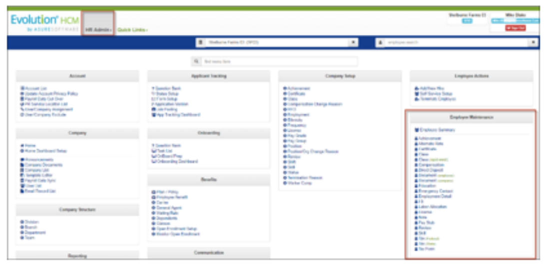
In addition, the **Employee Access Option** in the **Payroll Products** tab in Evolution Classic will automatically be switched from **Employee Self Serve** to **Employee Portal**.

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.

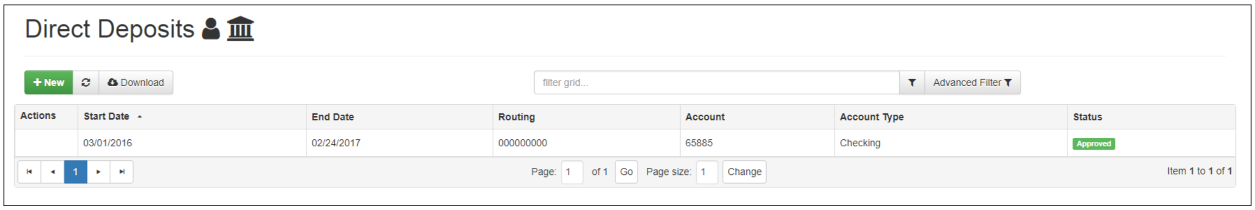
Direct Deposit

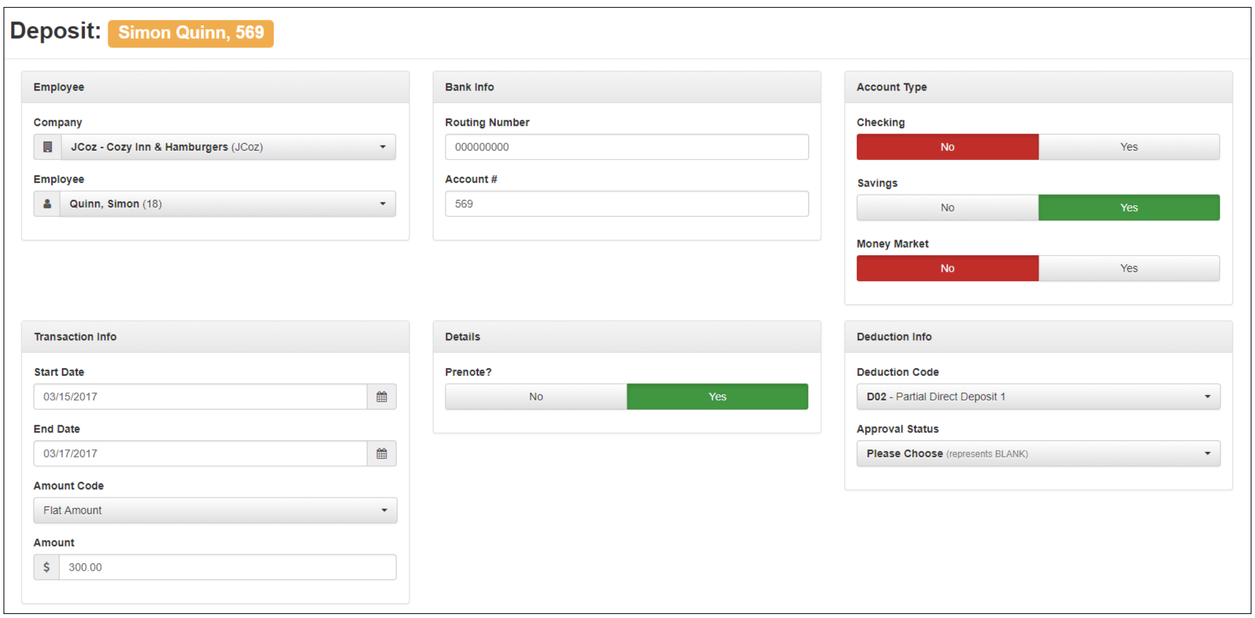
Base Users have the ability to add their Direct Deposits, whether for one bank account or multiple accounts. When an employee submits their Direct Deposit allocations for approval, their supervisor gets an email notification of the submission, including a link to follow so that they can approve or reject 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.

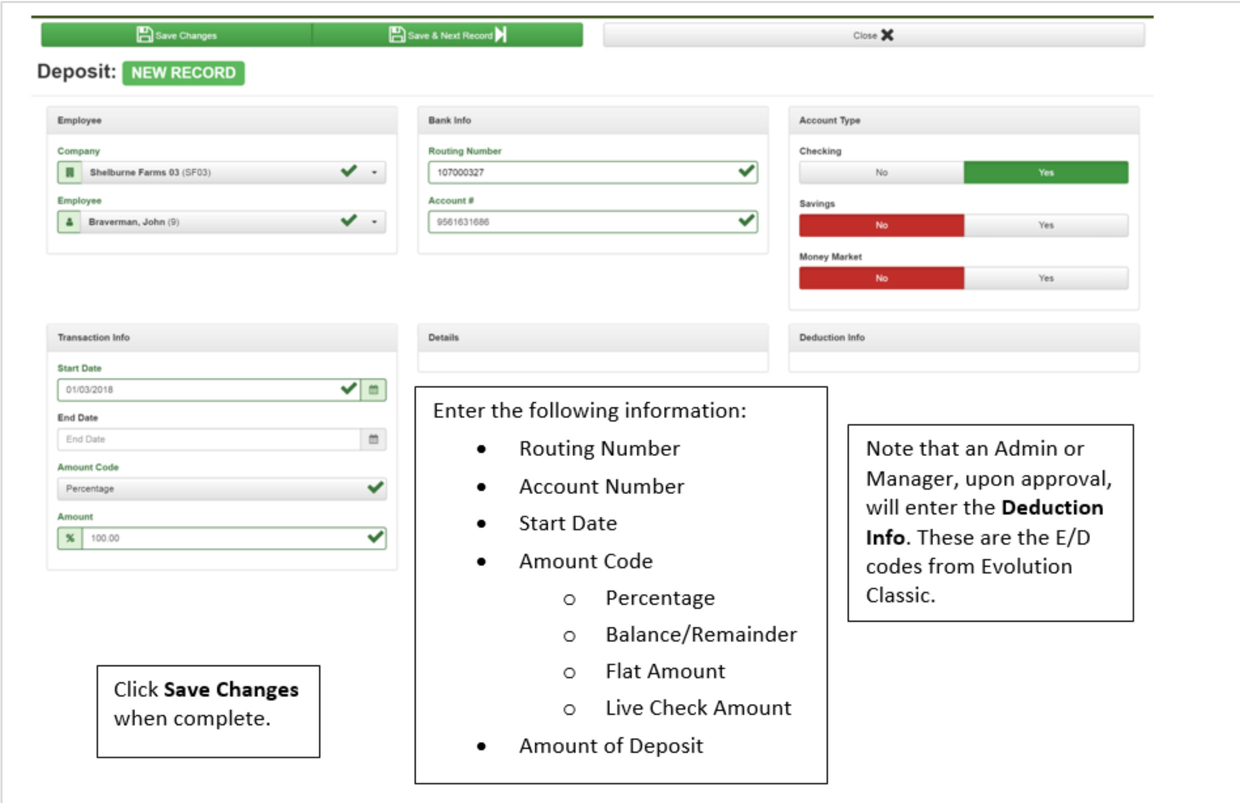
Base Users

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.





To enter a new direct deposit request record, click the **+ New** button.



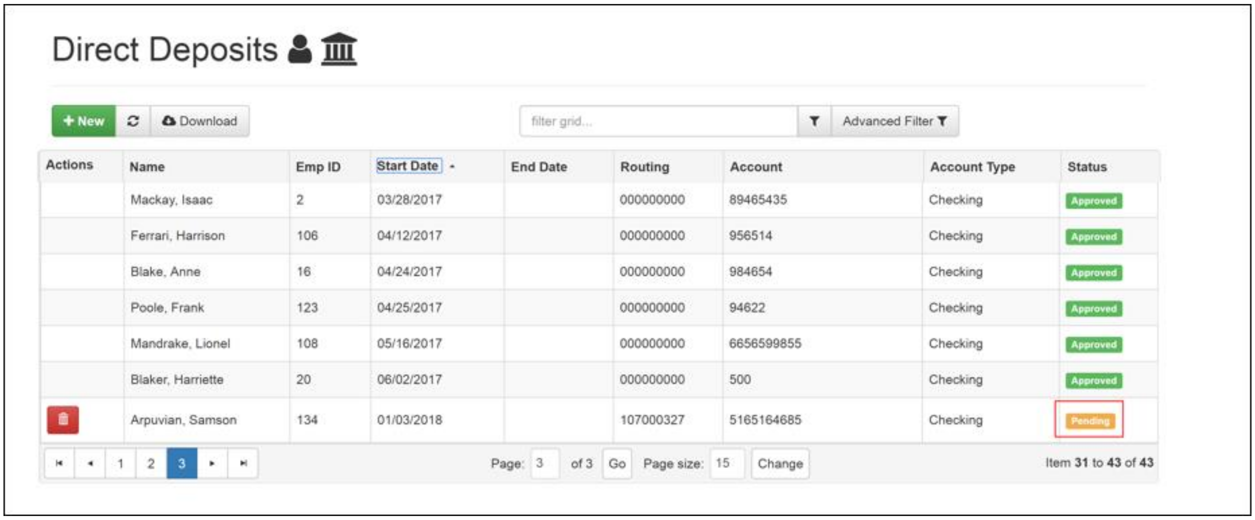
Note: Currently, the only **Account Types** that are set up for Direct Deposits are **Checking**, **Savings**, and **Money Market**. The system will allow for multiple entries in each category. Remember, if there are multiple checking accounts, for example, you'll need the corresponding E/D codes for each account.

Base Managers and Base Admins

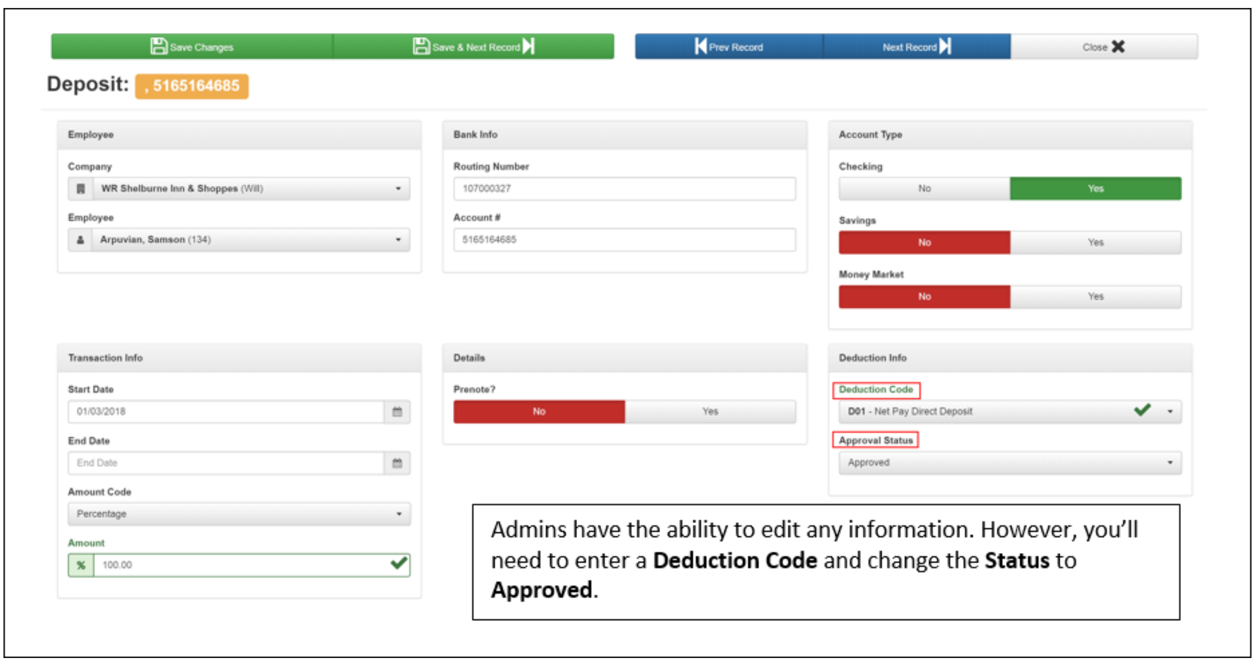
Base Managers and **Base Admins** have the ability to enter Direct Deposit information for employees:

- **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 Admim - Employee Maintenance - Direct Deposit**, to approve it.



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**.



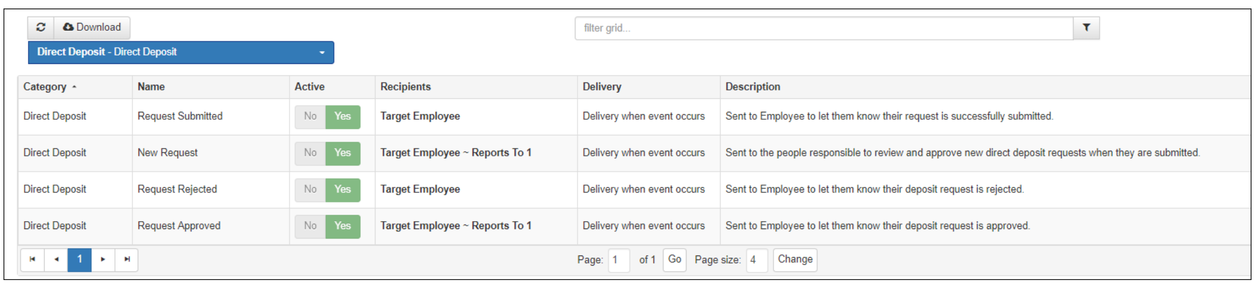
Once approved, the Direct Deposit will be active.

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.



Download
filter grid...
Direct Deposit - Direct Deposit

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.

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

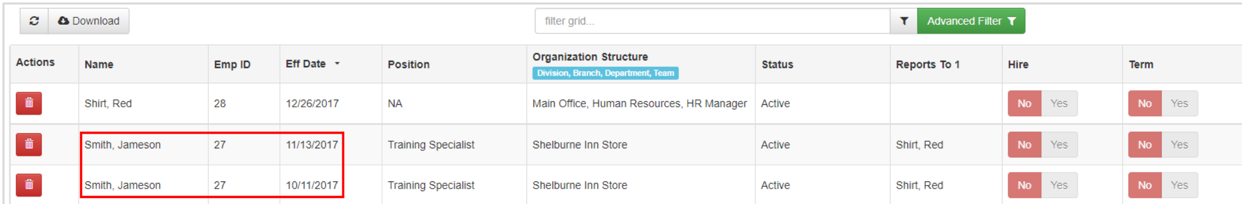
For more information about the Notifications feature, refer to the Notifications section of this Guide.

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:



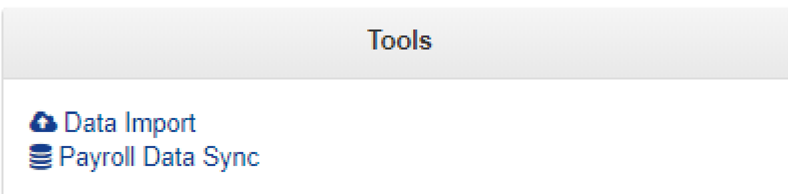
Actions	Name	Emp ID	Eff Date	Position	Organization Structure (Division, Branch, Department, Team)	Status	Reports To 1	Hire	Term
	Shirt, Red	28	12/26/2017	NA	Main Office, Human Resources, HR Manager	Active		No Yes	No Yes
	Smith, Jameson	27	11/13/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	No Yes	No Yes
	Smith, Jameson	27	10/11/2017	Training Specialist	Shelburne Inn Store	Active	Shirt, Red	No Yes	No 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:

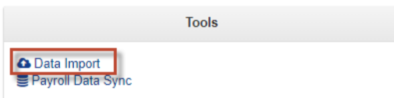
- Emergency Contact information
- Employee notes
- Achievements
- Certificates and license information
- Employee reviews
- Dependent information

- Class enrollment

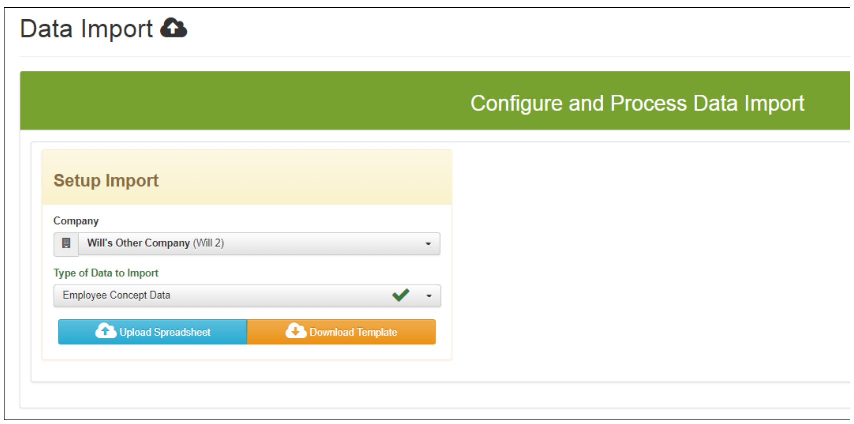
Note: The Data Import will not create information or documents, such as a Certificate or a Training Class. The tool will only import data and attach it to an employee. It is also important to remember that the import tool needs a location to import the data into it. For example, if a user wants to import Class information, the Class needs to have already been created and assigned to an employee.

To use the Data Import Tool:

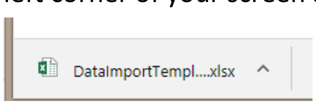
1. Go to **HR Admin – Tools – Data Import**.



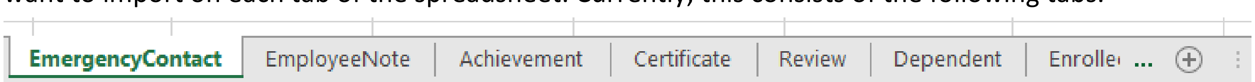
2. Select the **Company**.
3. Select the **Type of Data to Import** (for example, **Employee Concept Data**).



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

EmployeeID	ContactType	FirstName	MiddleName	LastName	Address1	Address2	City	State	Zip	EmailAddress
6027	Brother	Joe	William	Hally	212 N HOLBROOK RD		SCOTTSDALE	AZ	85255	joe.hally@mydomain.com

Employee Note tab

EmployeeID	Date	Title	Description
6027	1/2/2018	Yelling	Yelling on personal phone call

Achievement tab

EmployeeID	AchievementTypeCode	AwardedDate	ExpirationDate	Notes
6027	INT	1/2/2018	4/2/2018	Internship completed on 4/2/1018

Certificate tab

EmployeeID	CertificateTypeCode	CertificateNumber	IssuedBy	IssuedDate	ExpirationDate	Notes
6027	FIN	C123456	Head of Finance Dept	1/2/2018	1/2/2019	Completed with honors

Review tab

EmployeeID	ReviewTypeCode	ReviewStatusTypeCode	Reviewer1EmployeeID	Reviewer1ScheduledDate	Reviewer1CompletedDate	Reviewer1Rating	Reviewer2EmployeeID	Reviewer2ScheduledD
6042	ANNUAL	C	6027	1/1/2018	1/2/2018	85.50	6024	1/3/

Dependent tab

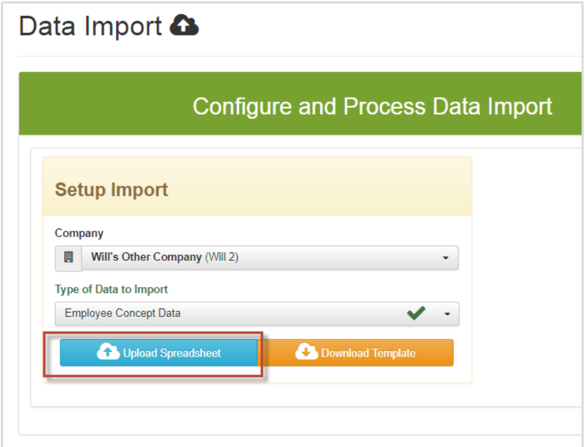
EmployeeID	RelationshipType	FirstName	MiddleName	LastName	BirthDate	SSN	GenderTypeCode	IsInsured	IsStudent	Address1
6027	Child	Kim	Daisy	Harrison	1/2/2015	123-45-6789	F	True	False	212 N HOLBROOK I

Enrolled tab

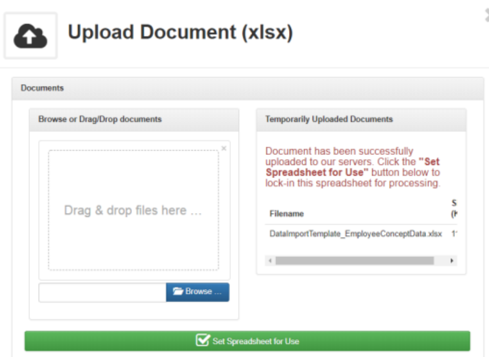
EmployeeID	ClassTitle	GradeOrResult	CompletionDate	ExpirationDate	Notes
6027	Harassment Training	95	1/2/2018	1/2/2019	Completed with complete understanding

6. 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.

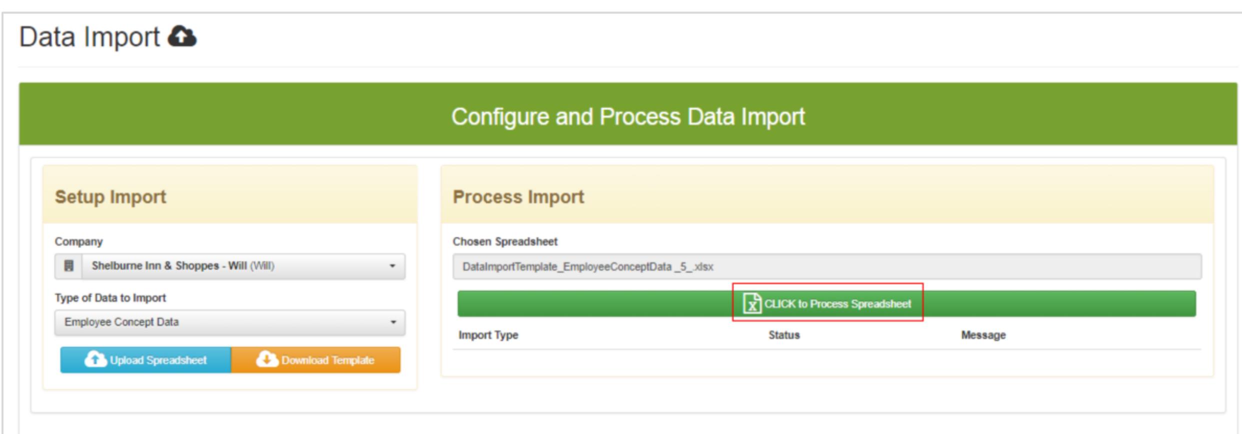
7. To upload the employee information to Advanced HR 2.0, go to **HR Admin – Tools – Data Import**. On the **Data Import** screen, select the **Company** and **Type of Data to Import**.



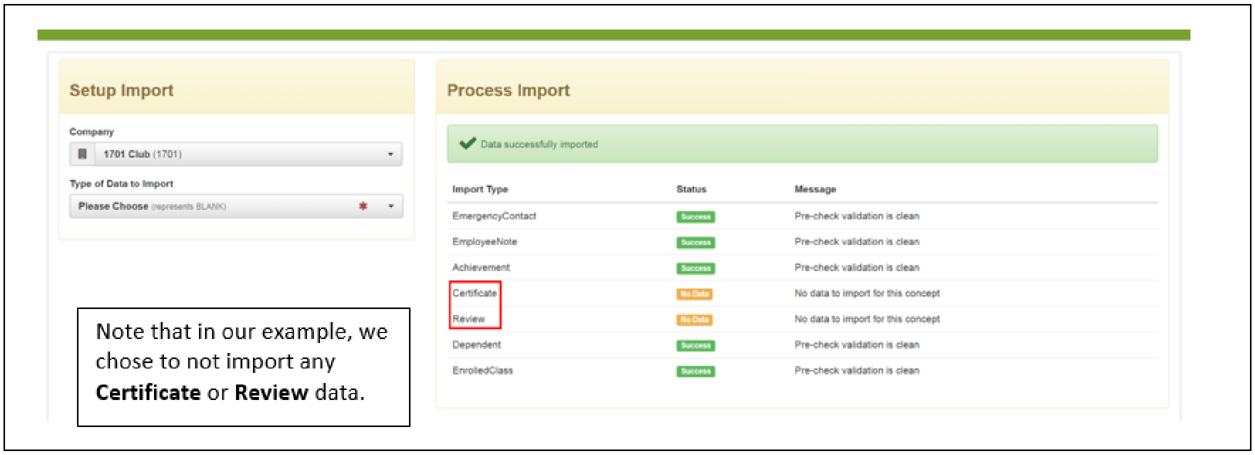
8. Click the **Upload Spreadsheet** button.
9. Browse or Drag & Drop the Data Import Template file into the **Documents** field.



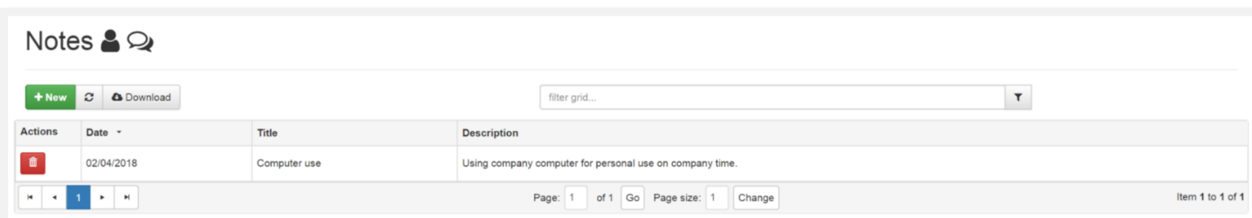
10. The system moves the Data Import Template to the **Temporarily Uploaded Documents** section of the screen. Click the **Set Spreadsheet for Use** button.
11. Back on the Configure and Process Data Import screen, in the **Process Import** section, click the **Click to Process Spreadsheet** button.



After clicking the **Click to Process Spreadsheet** button, you'll be able to see the Status of each Import Type:

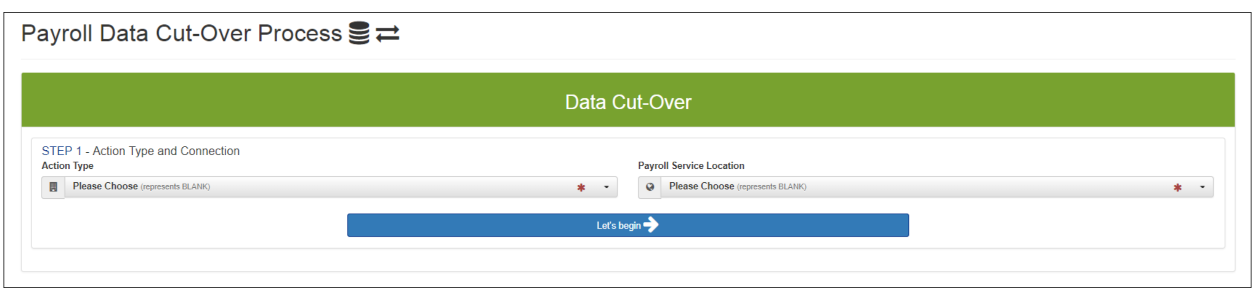


Once the Data Import is complete, and you get confirmation of the import, you can verify its success by viewing the information in the corresponding screen. For example, to verify the **Notes** import for an employee, go to **HR Admin - Employee Maintenance – Notes**.



Payroll Data Sync

The **Payroll Data Sync** menu item on the **Tools** menu is another link to the Payroll Data Cutover process.



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:

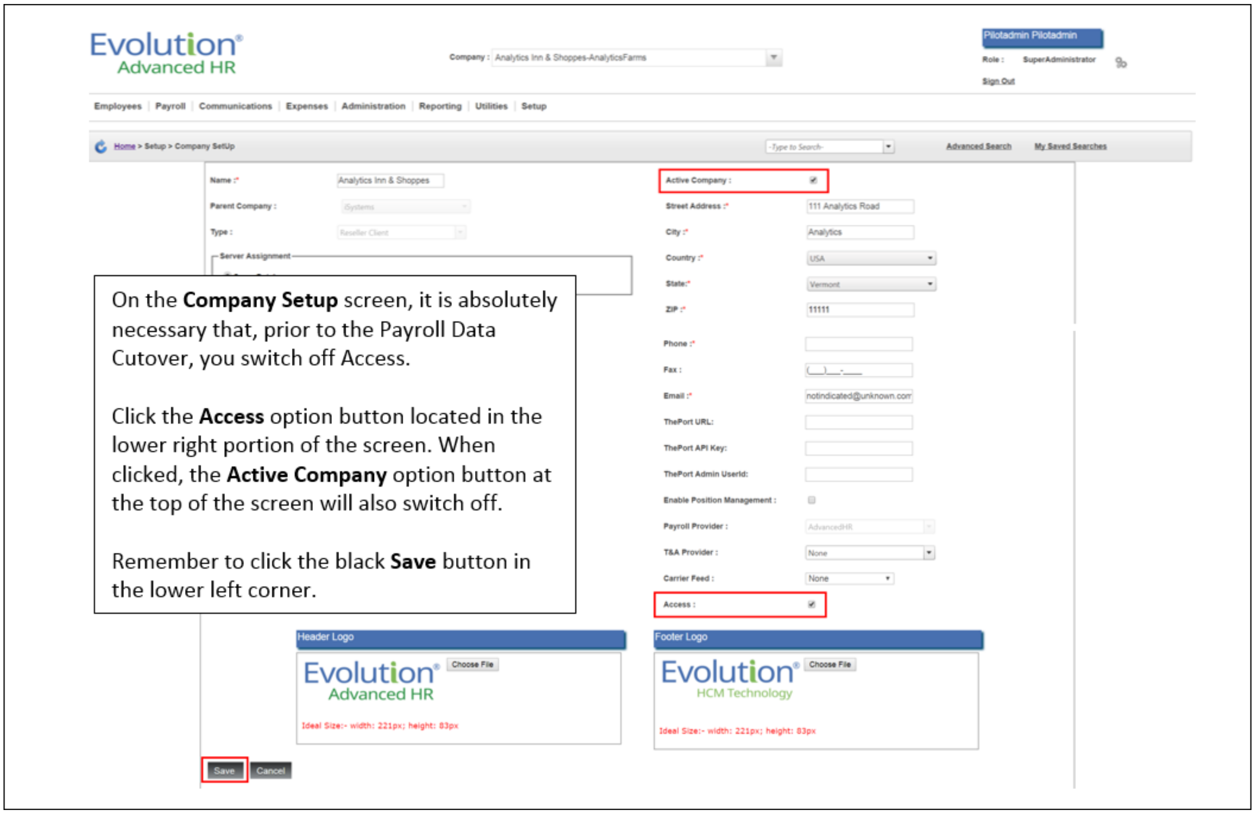
1. Disable user access to AHR 1.0
2. Perform the Payroll Data Cutover process
3. Use the Data Migration Tool to move the data

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.



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.

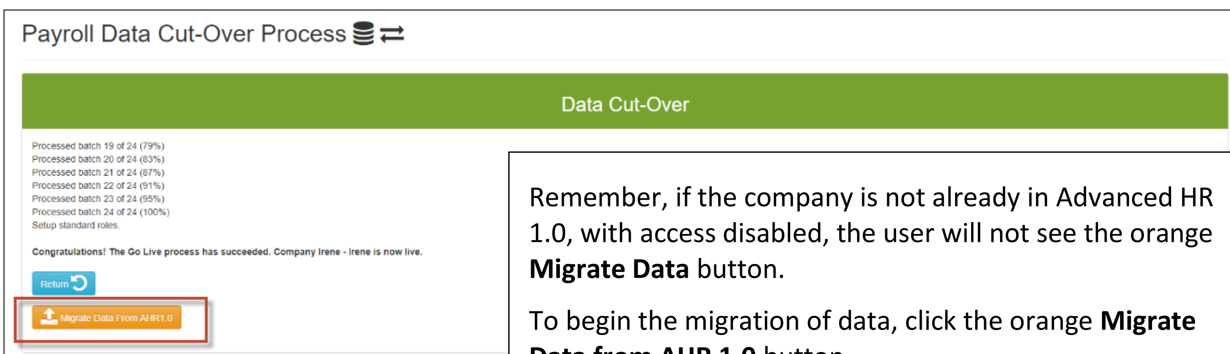
You are then ready to start the Payroll Data Cutover process, and the subsequent Data Migration, if applicable.

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."



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.

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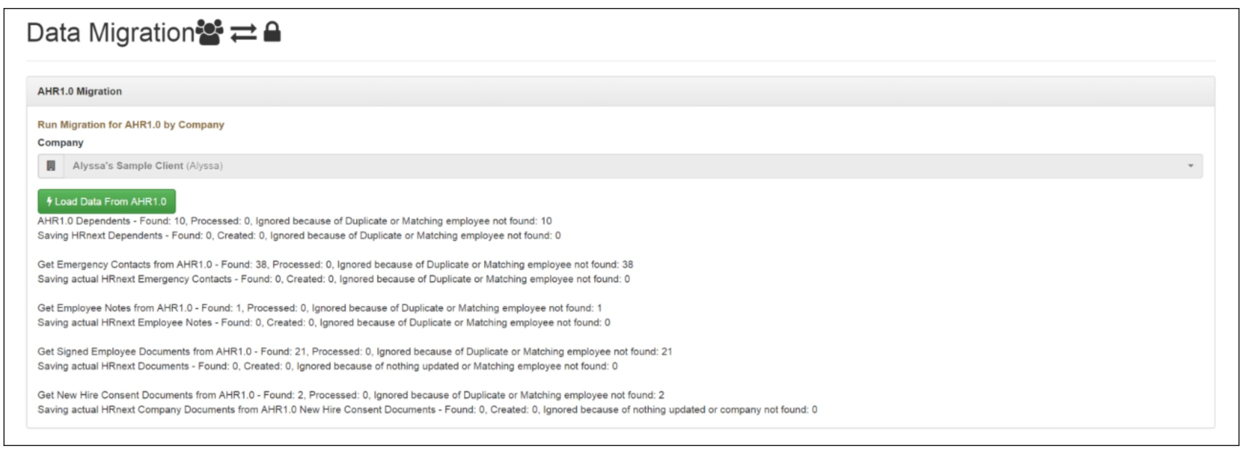
3. To run the Data Migration Tool, click the green **Load Data from AHR 1.0** button 

.

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"

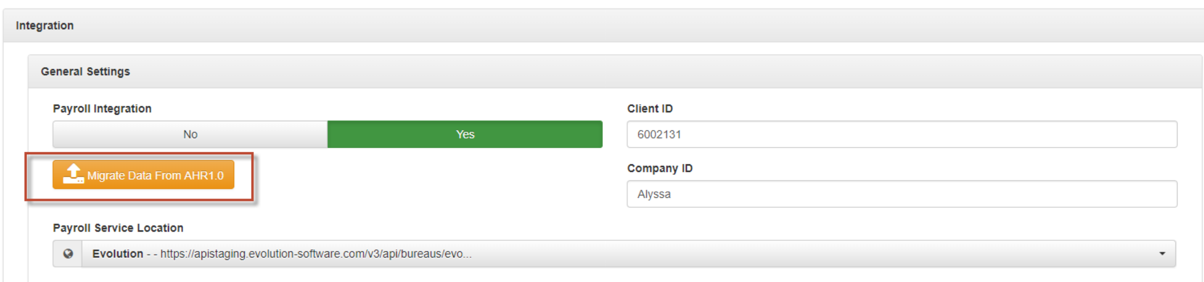
IMPORTANT! Once the Data Migration Tool process is completed, make sure that you verify that user access to Advanced HR 1.0 has indeed been disabled for users since, after the Migration, Advanced HR 2.0 is the system of record and no changes should be made to the company data in Advanced HR v1.0

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 

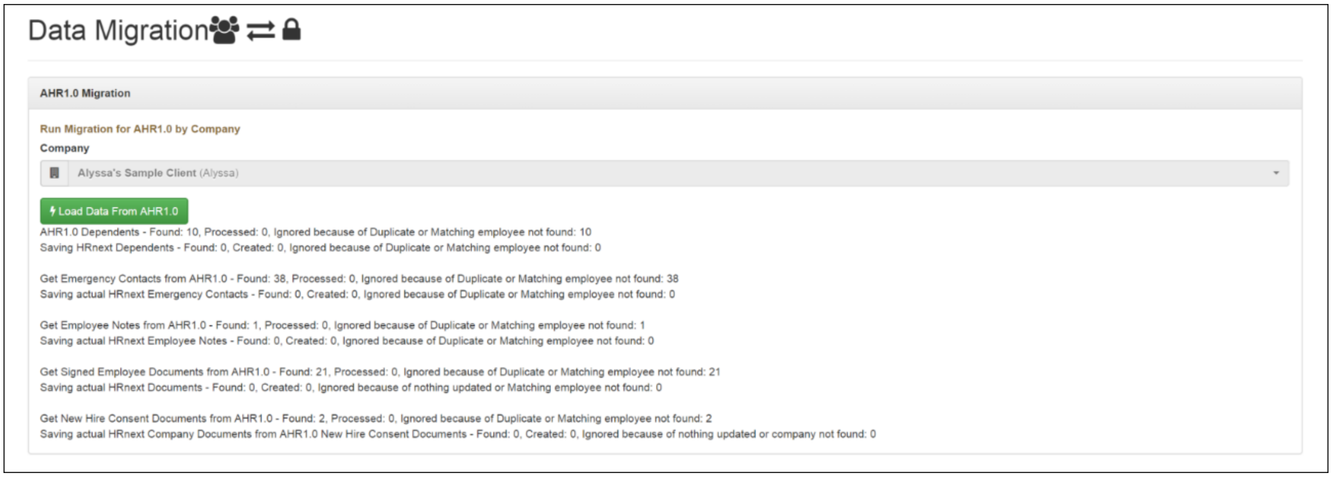
.



3. The system displays the **Data Migration** screen.

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.

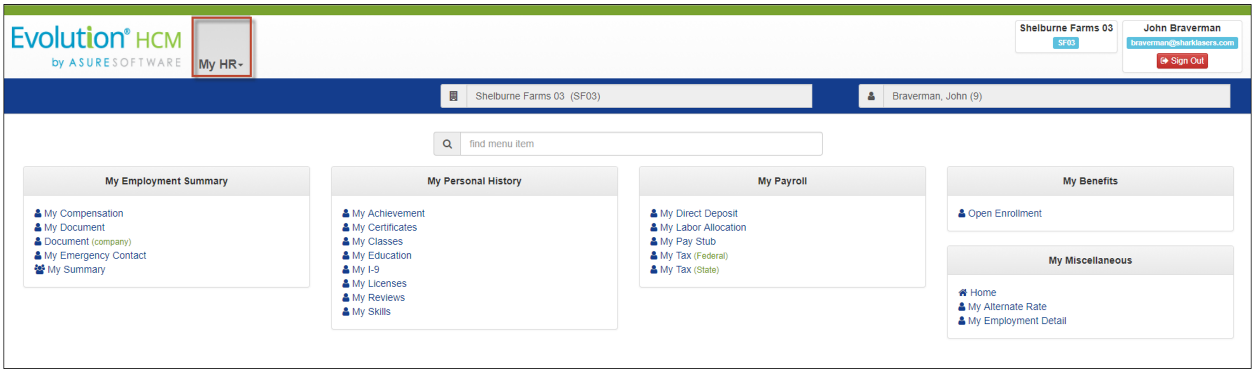


- For example, for the employee Notes info category, if it found Notes information, how many records it found, and processed, and then created, as shown in the highlighted area of the above screenshot.
- If the system does not find any information for an info category, for example – Dependents info, 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:

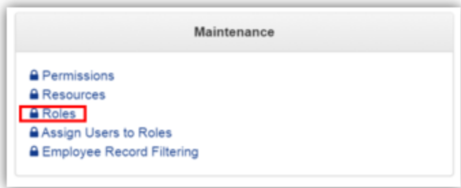
Starting with the section in the guide titled "My Employment Summary", the *Getting Started - Employee End User Guide* walks you through all the Advanced HR 2.0 screens from the employee's point of view. They are described in that guide rather than being duplicated here in this guide as well.

Security Menu

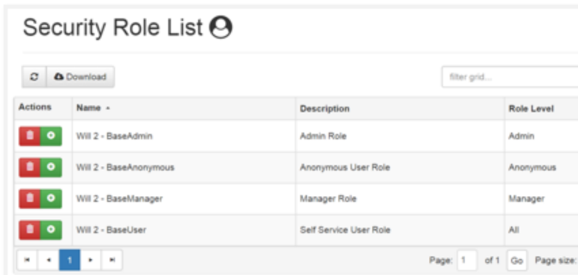
Base Security Roles will come over with the Cutover.

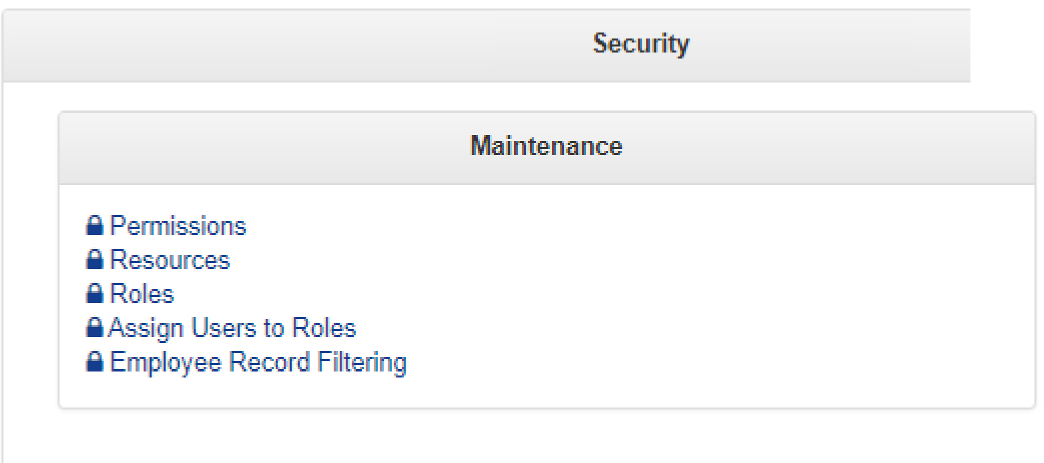
Initially, service bureau staff will be designated as **Super Admins** or **Service Bureau Admins**.

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





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.

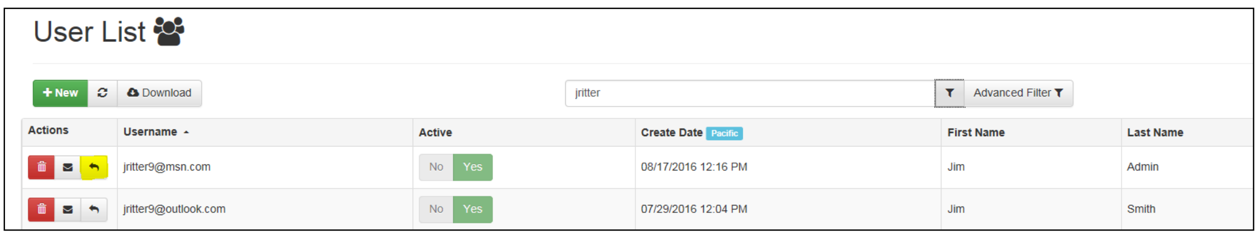
During the initial conversion or subsequent onboarding process each employee is set up as a user with their unique username (email) and a **Security Permission** level of **ESS access**. Users requiring a higher level of access will need to have their Security Permission levels changed by the Service 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.

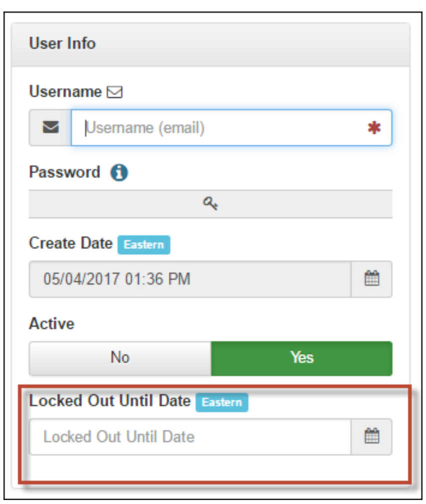
All security settings extend to reporting; therefore, a user who is not allowed to view salary information will not be able to generate a report with salary data.

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



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.



Appendix 1: Future Dated Fields List and Onboarding Validation Report (S3550)

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** (**S3550**), that when run, will display the fields listed for each employee that has a future effective date.

The **S3550 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 (S3550)	
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 Bailing

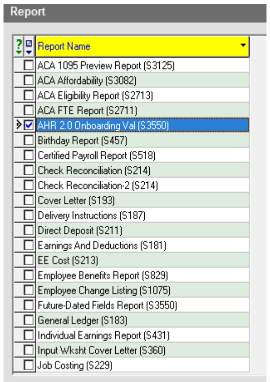
Note: The **Name** fields and **Social Security Number** fields cannot be future dated in Advanced HR 2.0.

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:

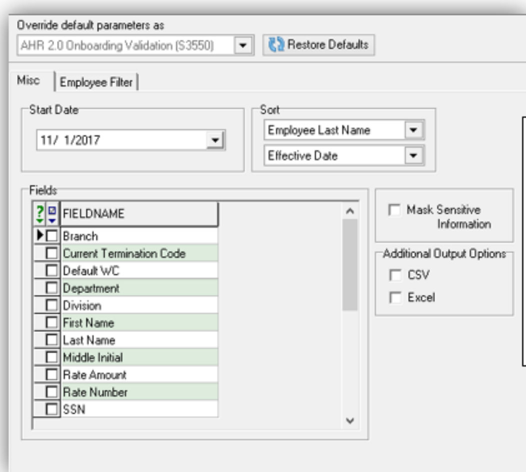
1. Go to **Reports-Run Reports**.
2. Select the company you are planning to onboard.
3. Select the **Onboarding Validation Report** (**S3550**).



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.

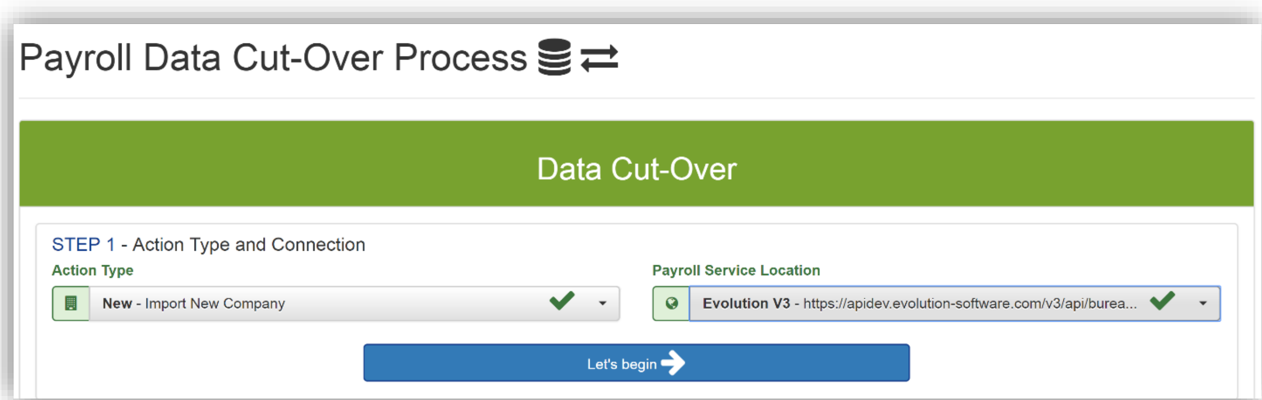
It is highly recommended that you keep this report. After the Payroll Data Cutover, it will be the only record of future changes to the employee's information.

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.



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.