User Guide

iDocuments Self Service HR

29 May 2020

Contents

1. Introduction

iDocuments Self Service HR is a web browser and mobile based service management solution which helps to improve efficiency, productivity, control and compliance.

Within iDocuments each user is allocated a profile for recording basic information in order to enhance the functions described further in this document. The user profile is accessed from the settings area above the menu and provides the following features.

Users access is profiled according to their role and the data they need.

2. Other sources of information

Further information is available at www.idocuments.co.uk and https://www.idocuments.co.uk/technical

3. Self Service HR Process overview

iDocuments Self Service HR incorporates the following processes:

- Personal details – with self-service and approval
- Absence management – holidays (with balances) and sickness
- Identification documents (managed by Dynamic Documents)
- Appraisals (managed by business processes in conjunction with dynamic documents)
- Equipment (managed by dynamic documents)
- Pay rates & benefits – list with type, frequency, value and currency
- Notes – list with note, date and user
- Attachments - list with type, key words, file, title, description and version history

4. Workforce HR time-off and absence management

Absence can be monitored as follows:

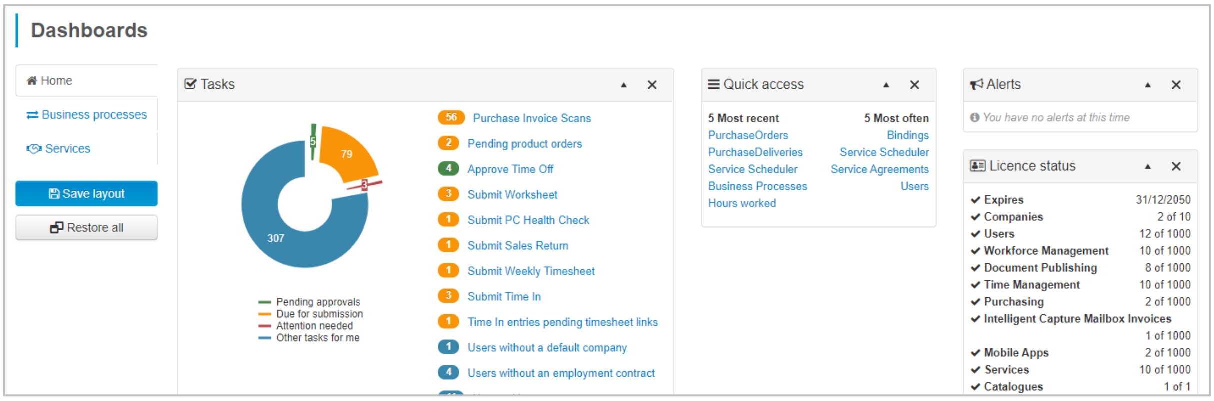
- Public Leave - non-working days, where allowance is not deducted
- Personal Leave (Holiday) - where allowance is deducted (e.g. holiday, vacation)
- Personal Leave – where allowance is not deducted (e.g. Doctor or Dental appointment)
- Sickness - where allowance is not deducted
- Compulsory Days – for Company closures, for example, between Xmas and New Year where allowance is deducted from all employees

Public holidays are automated from the assigned working pattern. All other absence follows the same structure, whereby the user may request the time of absence by submitting for approval to follow a predefined workflow.

The Time-Off module integrates into the scheduling and time tracking functions by feeding the information automatically to them. For example, holidays are shown on the timesheet to reduce the total number of hours for declaration.

5. Dashboard

The Dashboard will provide the user with a Summary of their Tasks and Alerts and quick access to the forms they use most commonly.

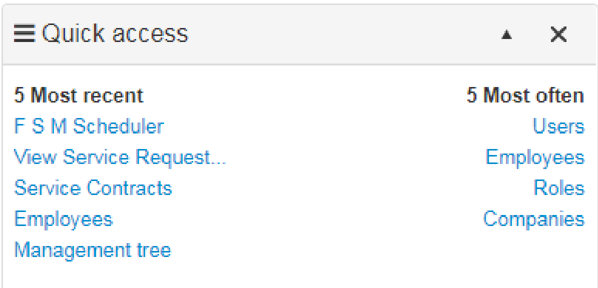


Tasks

Lists *Tasks* assigned to you; click on the task link to action.

Quick Access

For each user, quick access will present links to the forms most commonly used.



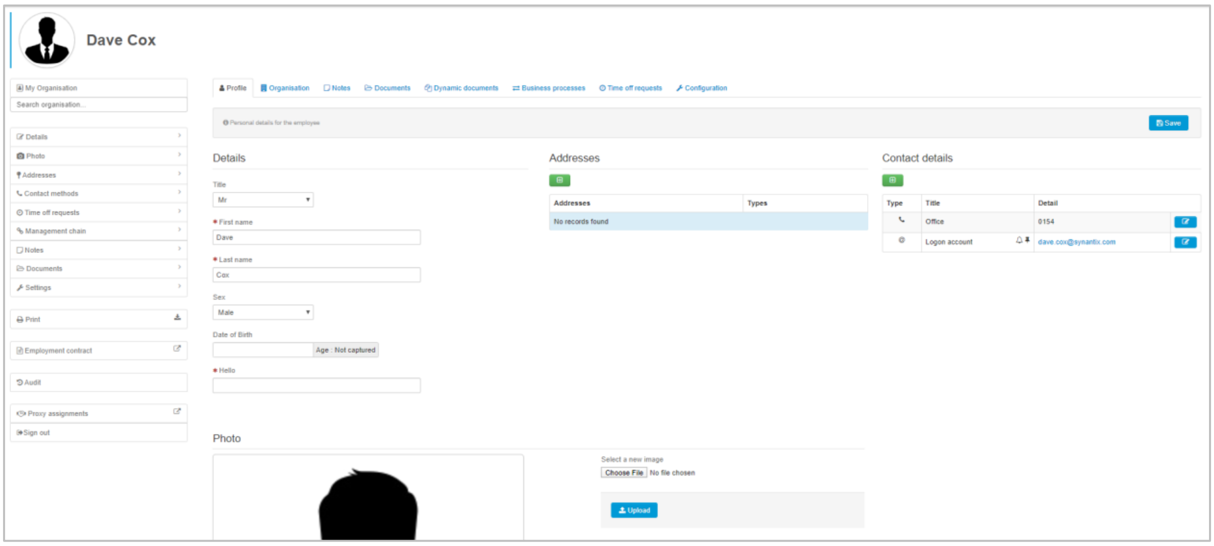
7. Self Service Management Menu

Profile Details

Workforce > Self service > Details: Profile Tab

The Details form contains employee personal information such as name, a photo, email address and contact information.

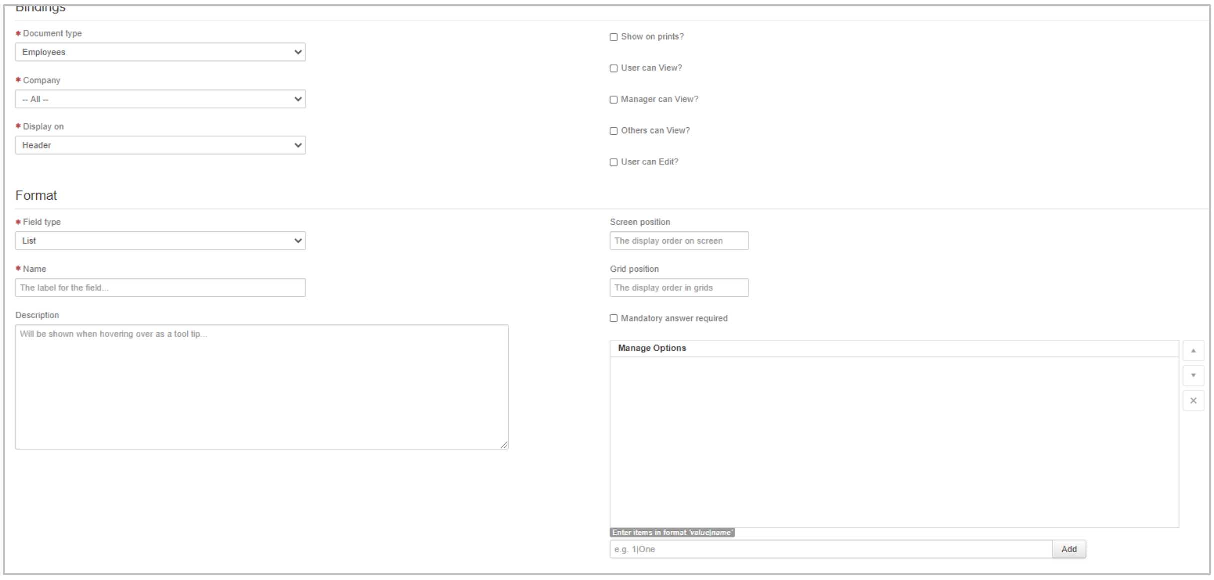
User Profile Tab



Custom Fields

Standard HR fields are set up for personal and contract information and it is possible to add fields that may be specific to your organisation by using HR UDFs. They can be configured as follows:

- Type – textbox, scrolling textbox, date, tick box, whole number, decimal number, drop down selection (along with options) or a file upload
- Name, Description & tool tip
- Rules
    - Position on page and grids
    - Mandatory
    - Who can see it
    - If included on pdf prints



Data Change Approval

The Change Approval setting, if enabled, with allow users to make changes to personal details. Changes will require approval by HR before they are committed to the change to the HR record. Changes are logged for audit purposes.

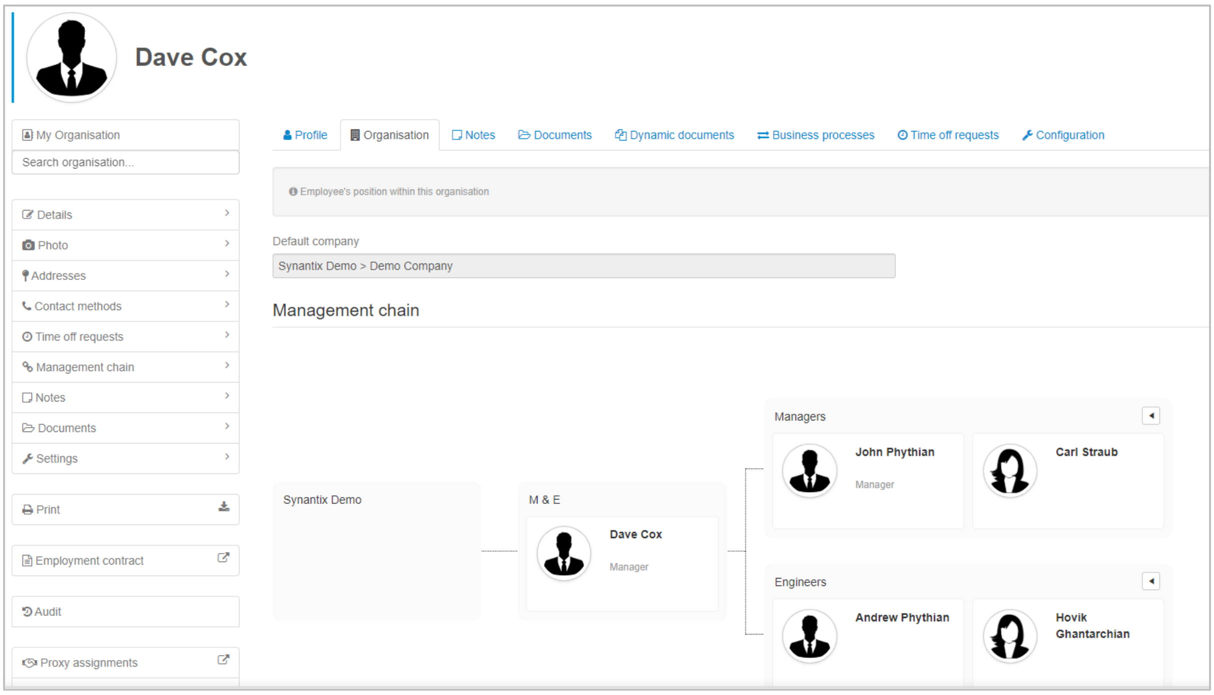
1. User edits one or more piece of information
2. Field retains old value but indicates a change is pending
3. HR are alerted on home page
4. HR load the profile to review the change and will either approve or reject it
5. Approved
    a. Data is updated
    b. User is alerted of the approval
6. Rejected
    a. Original data remains
    b. User is alerted of the rejection

All actions are recorded and tagged with dates and HR or the user can review old version (approved or rejected) to see changes made.

Organisation – Employee Team

Workforce > Self service > Details: Organisation Tab

This displays the hierarch for the employee's team. Each user can be allocated in to a single team but each team can have multiple sub-teams giving a flowing hierarchy of management.



My Organisation – Organisation Level

Workforce > Self service > Details: My Organisation

This displays the hierarch for the entire organization.

Each team can have multiple managers and where no manager is found at the current level it will traverse up the tree until one is found. If none are found, then no manager is defined and workflows will skip the 'manager' step if one exists.

Flowing down the chain each manager has managerial access granted to all users of the sub-teams but this does not apply to standard users flowing up the chain (i.e., the higher in the chain the more access granted).

The tree is created automatically with an initial 'top of the chain' team. Then additional teams can be added by right clicking the team to 'add child level' or 'edit' (to change name) or 'remove' to delete from the hierarchy and reassign the users to the level above.

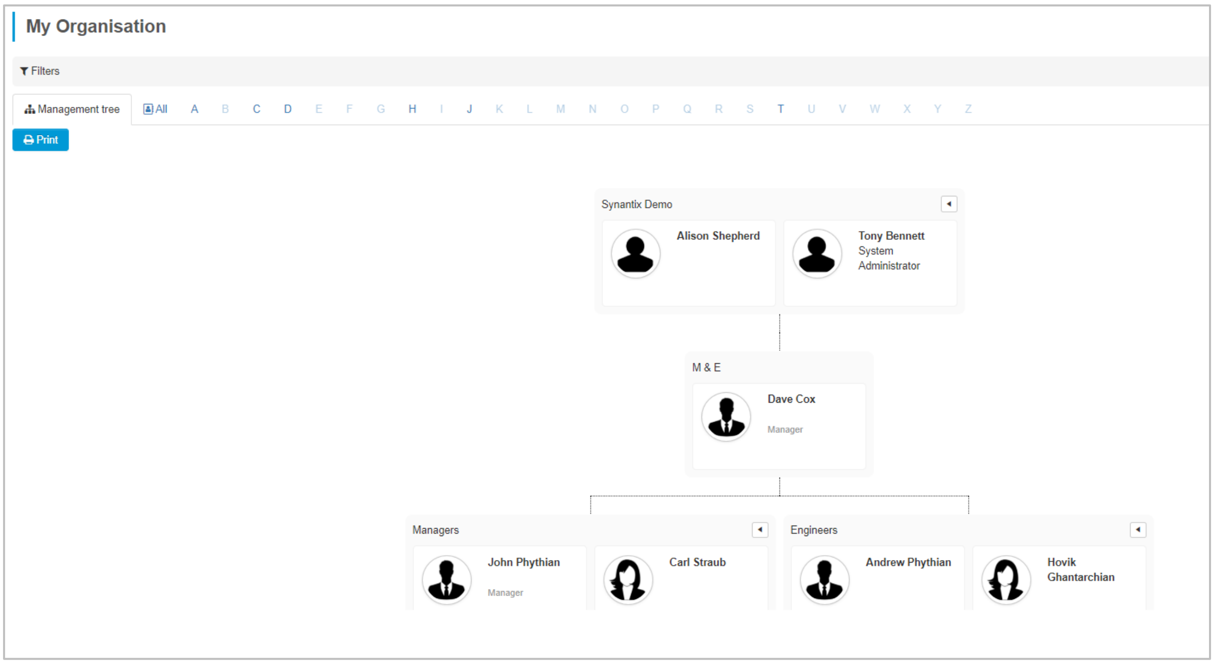
There is a 'drag & drop' facility tom more the location of Teams within the structure, and once the team structure is created any unallocated users appearing on the left may be dragged to a team and dropped or moved from one team to another. To determine the manager of the team the user can be right-clicked to 'toggle manager status'. Once completed, the structure can be saved for it to take effect.

Company Management Tree and Directory

Once the team structure has been created a read-only company directory and organisational hierarchy can be presented to all users.

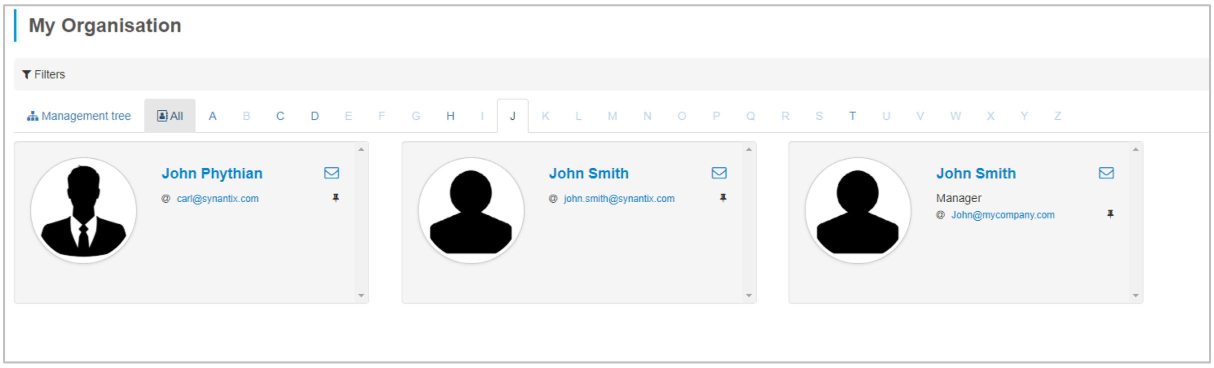
Management Tree View

Select an individual from the visual hierarch to drill-down to their details or send an email. The arrows can be used to expand or collapse the tree.



Directory View

The company directory is an alphabetical grid display of all users linked to the chosen company and can be filtered to an individual by name, position or contact details, or by selecting a letter from the alphabetical list. Selection will present contact cards for details of the employee including email and internal messaging.



Notes

Workforce > Self service > Details: Notes

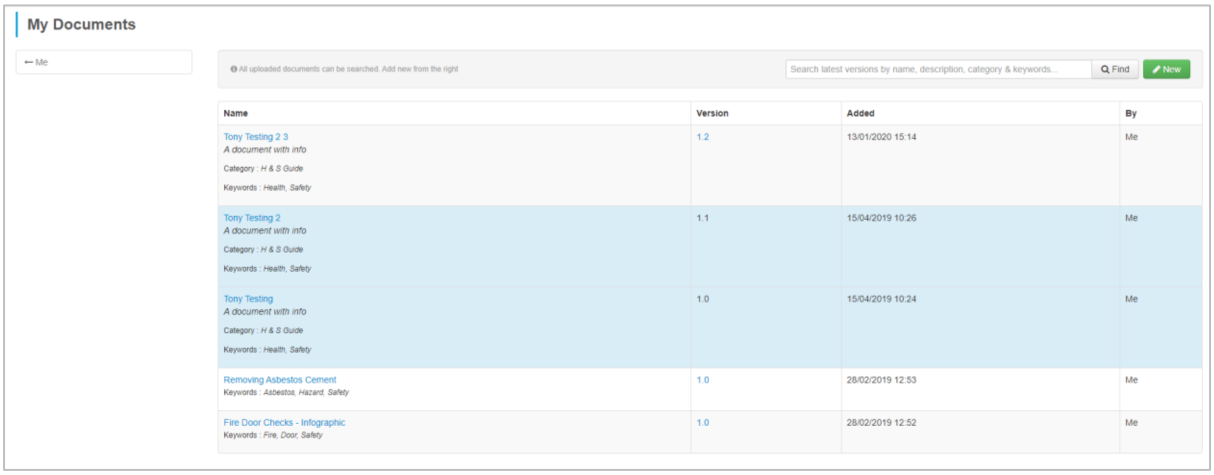
A user may add and delete notes to their profile area.

Documents

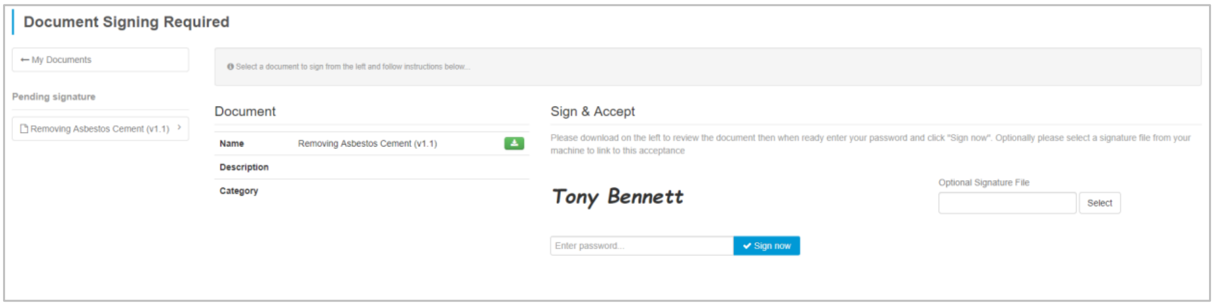
Workforce > Self service > Details: Documents

iDocuments integrated Document Management facility allows you to distribute and manage procedural and guidance documents, 'version control' ensures Users are accessing the current and up to date versions of documents.

A searchable library of documents for each User is maintained, which can include Microsoft Word, Visio, PowerPoint and Excel formats. Users can open documents to review or add new documents to the library.



If a document workflow requires acknowledgement and signature, the employee will be required to provide an electronic signature, allowing for document verification audit.



Dynamic Documents

Workforce > Self service > Details: Dynamic Documents

Dynamic Documents is powerful and flexible facility that allows you to create workflows, task lists and custom processes.

iDocuments offers the facility to create user-defined documents that work dynamically with iDocuments and your ERP data, giving you the flexibility to define the fields and rules you need. Dynamic Documents puts the user at the centre of the process, where document permissions and approvals are linked to a user's profile.

Dynamic documents may be linked to a 'Business Process' as a mandatory part of process workflow.

Business Processes

Workforce > Self service > Details: Business Processes

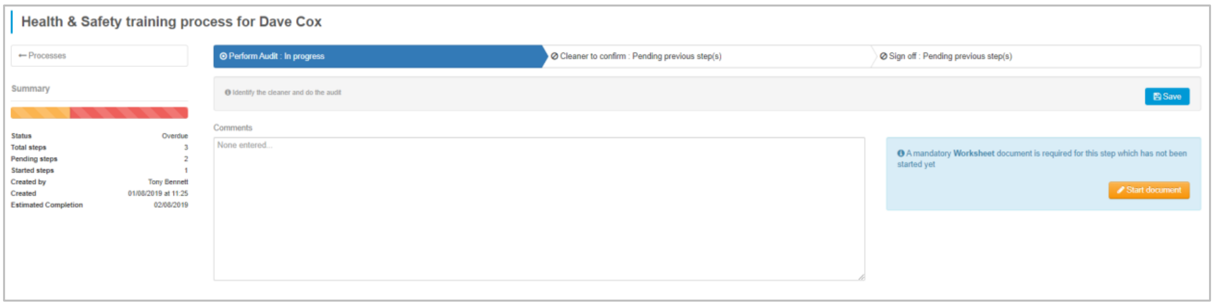
A Business process can be defined by you to automate specific processes within your organisation. And is composed of a number of defined steps in an automated process workflow, which may also include Dynamic Documents that are linked to defined steps.

Processes can be assigned to individuals or Roles within your organisation and have associated approvals for each step.

Business processes could be used for HR processes such as scheduled training and development, employee onboarding, Scheduled training, scheduled appraisals, equipment, assets records and tracking.

For each step of the process the appropriate user(s) receive automatic alerts to complete that step and complete and submit any mandatory documents associated with it.

An ongoing process status audit and history is included for process review and reporting.

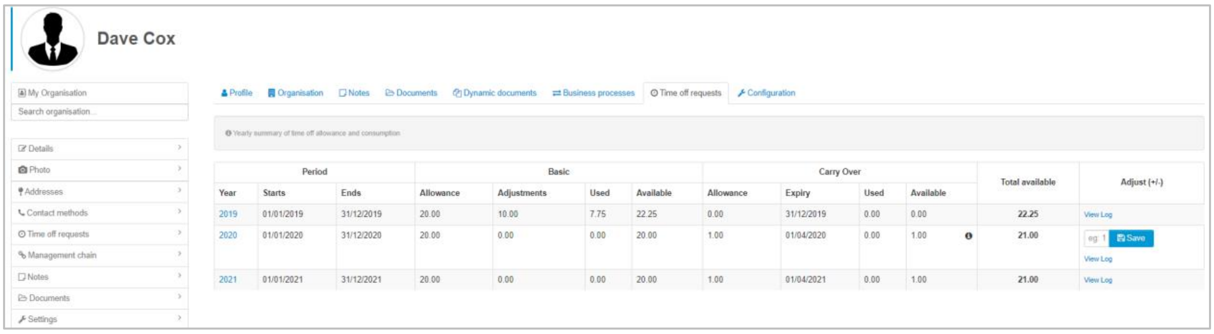


Time off requests: Holiday balances

Workforce > Self service > Details: Time off requests

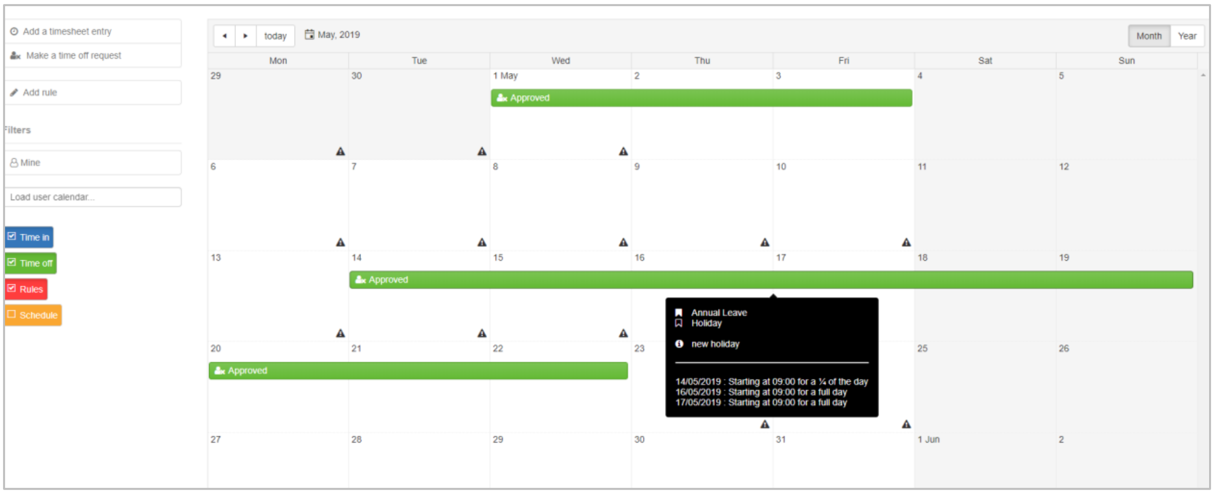
List View

A list summary of time off consumed and requested per year, along with a running total of the remaining holiday balance.



Calendar view

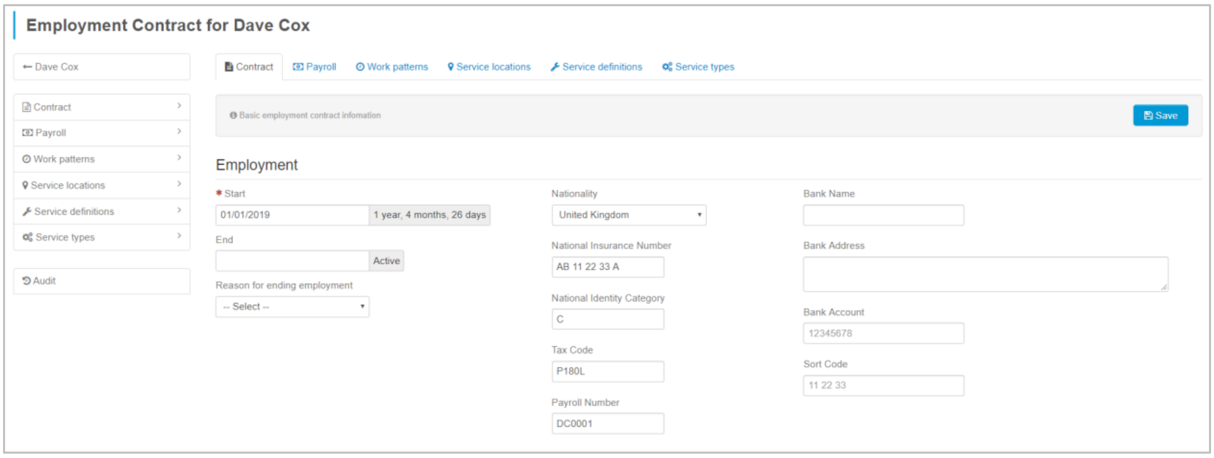
A year view interactive calendar display showing time of by 'type', for example 'deducting' and 'non-deducting'.



8. User Contract Menu

Contract

Details employee contract information, start date, cumulative length of service, PAYE, Tax and Bank account information.

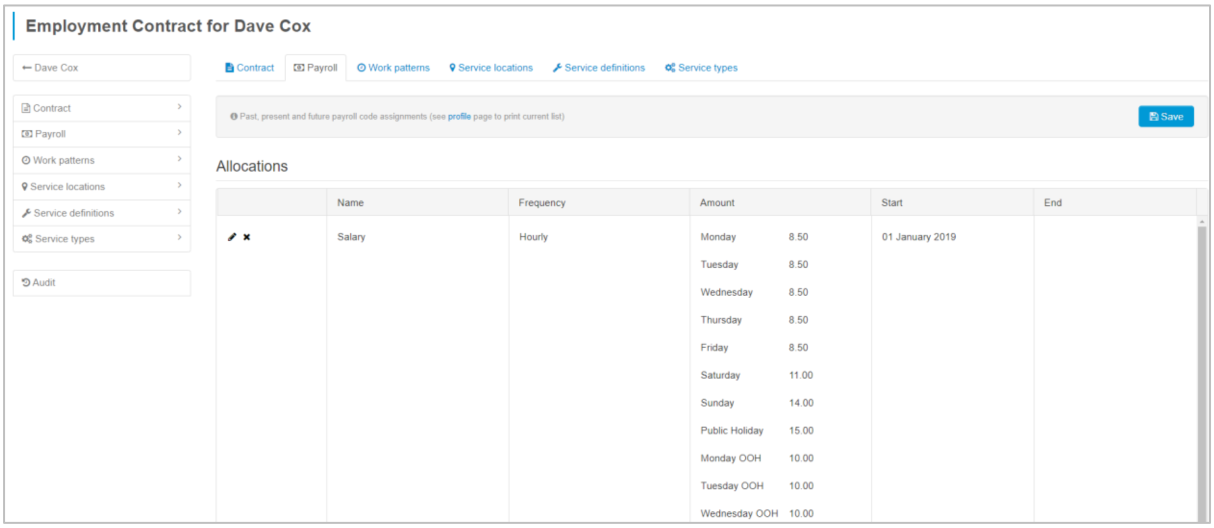


Payroll

iDocuments can be used to collect payroll and contract details and assign payroll allocations. Firstly, a list of payroll codes can be created.

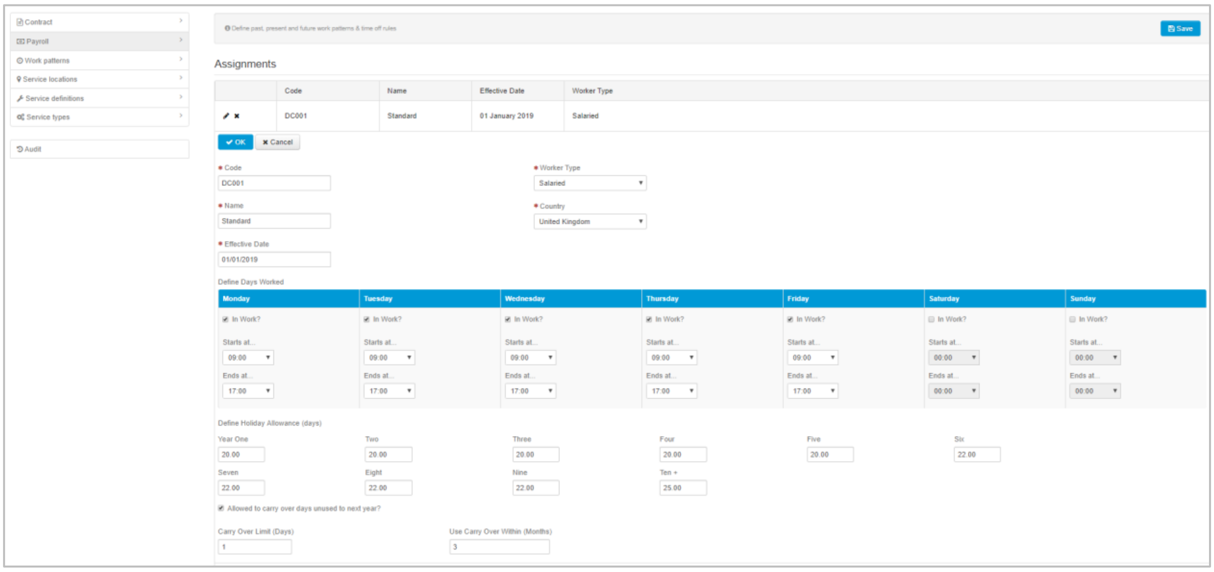
Using this list, an assignment can be made to the user to define the following information:

- Code selection
- Frequency occurrence – selection of a number of hours, days, weeks, months or years for appearance on payroll
- *Amount*, for example, the number of hours assigned to day by type: regular working day, Out of Hours day and Public holidays, and effective period by *Start/End* date range.



Work Patterns

The Work Patterns Tab Displays the work pattern allocated to the user.



Work Patterns Settings

Within this form, select the *Edit* icon to access the *Assignments Form* to edit the work patterns and holiday schedules for the user.

In order to collect accurate timesheets, record absences and assist in project planning each user is allocated a working week structure.

This structure determines when they should be working by defining the following:

- Country they work in, this will define public holidays as applicable to that country
- Type of contract (to pick up configured rules)
- Working days and times
- Holiday booking and balance rules

Holiday Schedules

The system works on a holiday year rollover to obtain a starting and ending balance for each user. Once the first year is defined with a starting date each year continues from the previous automatically.

Any new users will need to be configured with a holiday allowance and a starting date in order to create the first year – this allows new users to be allocated a FULL holiday allowance but any starting within the current year will be reduced as per a standard daily accrual.

9. Time Management Menu

Time Off Requests

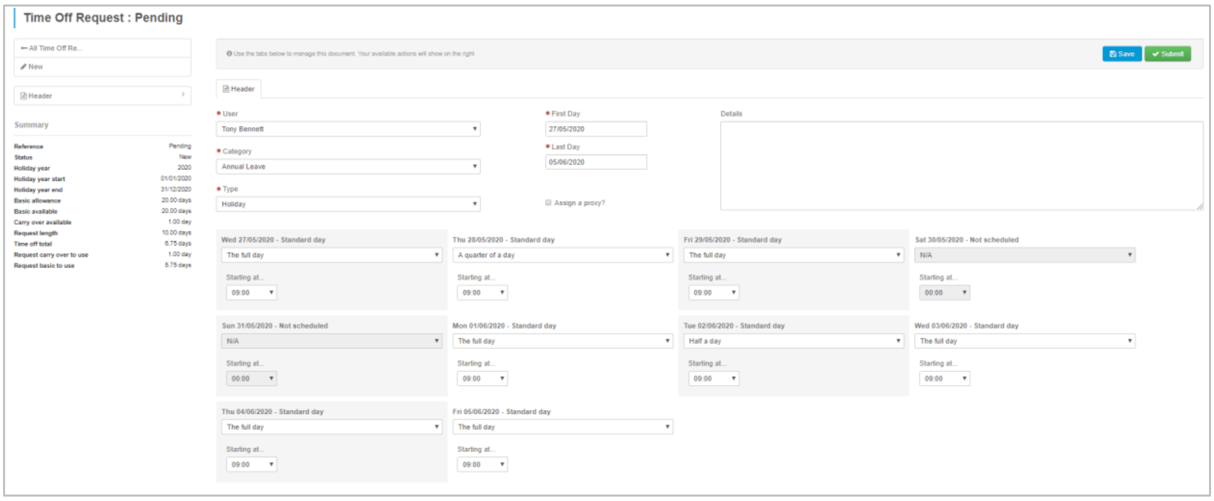
Time: TIME OFF REQUESTS > New

Employees complete the time off request for automatic routing to the appropriate person for approval: details include type of leave and date range.

The user's holiday allowance balance is automatically applied to any request to ensure it is within the balance allowed. The system also will automatically flag up any dates selected that correspond with national holidays and any dates you add to the system where holidays are not permitted.

The user is alerted when a holiday request is either approved or rejected and approved holidays are automatically added to the user's calendar.

Managers and HR users may view multiple user calendars to review existing holidays booked to avoid clashes.



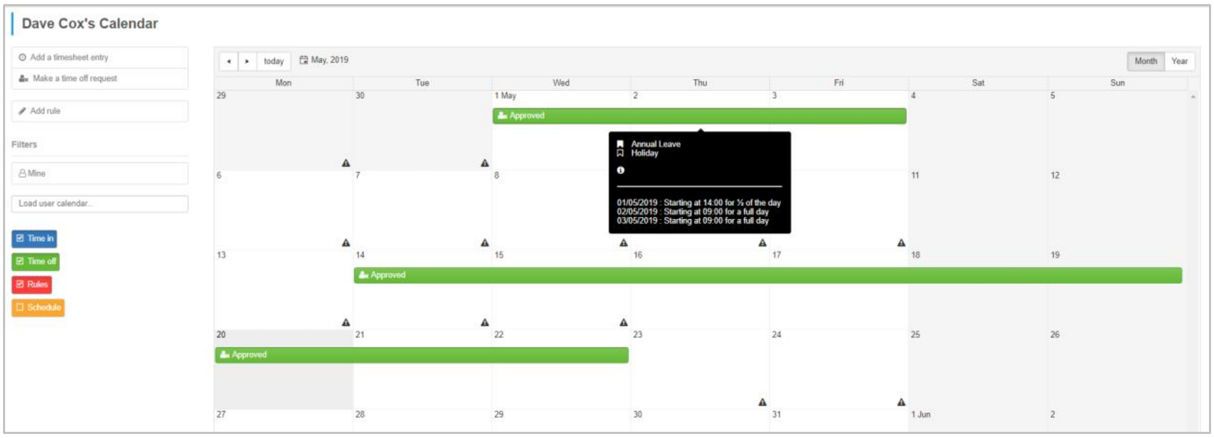
Calendar

Time: PLANNING > Calendar

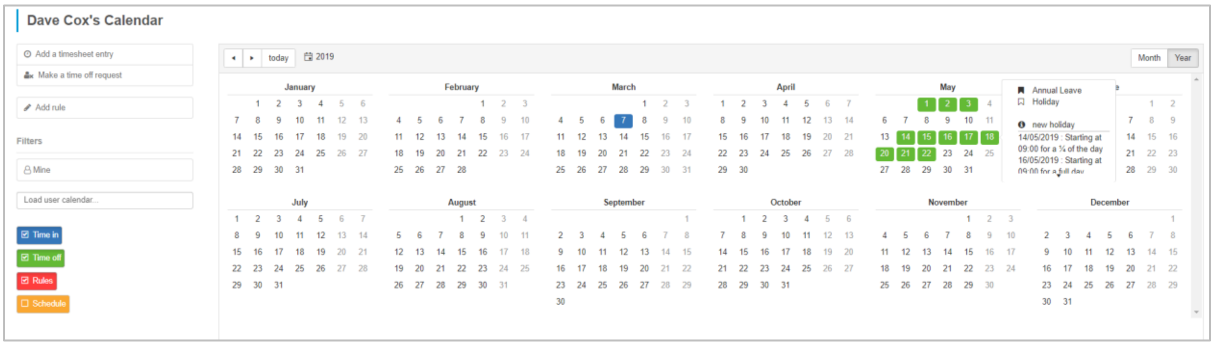
The interactive calendars are automatically populated with approved time-off, Time-in and scheduled tasks. By selecting a single or group of days and right-clicking, a time off request can be started.

My Calendar will display a user's own tasks and may be filtered by type of task. For a Manager, the calendar may be filtered to another user as defined by the permissions for the manager's team.

Month View



Year View



10. Smart View reports

iDocuments Smart View allows users to quickly and easily create key performance and analytical reports such as those listed below. Smart Views allows users to filter data and export the results to Microsoft Excel spreadsheet.

For both Manager and a HR users, there are a variety of standard reports available, all of which are pre-filtered to show only those employees of interest (i.e., those the user manages). All of the reports can be displayed to screen and exported to csv file for further review.

- Profile PDF print
- Emergency contact summary – to show users with and without contacts
- Personal details confirmation – history of users who have/not confirmed the information held on file is accurate. This requirement can be enabled/disabled within settings and can be defined to occur on a chosen cycle
- Document expiry – dynamic documents added to an employee which require renewals
- Document acknowledged log – distribution documents that have/not been viewed by users along with the signature status (if applicable)
- Absence summary – list of all types of absence recorded in the system
- Absence analysis – a scoring system of requests taken and days absent within a date range (often referred to as “The Bradford Factor”)
- Dashboard
    - Users without a default company (for HR Contract)
    - Users without an employment contract
    - Users without an emergency contact
    - Users with profile changes requiring approval (HR role)
    - Rejected profile details log
    - Business processes requiring action

11. Payroll integration

iDocuments payroll export function allows export of hours and hourly rate per site for each worker for standard or overtime hours. Once exported, a transaction is marked with exported status. The report which produces this export will export only transactions that have been marked as not exported.