EmployeeConnect
Work. Flow. Smarter.

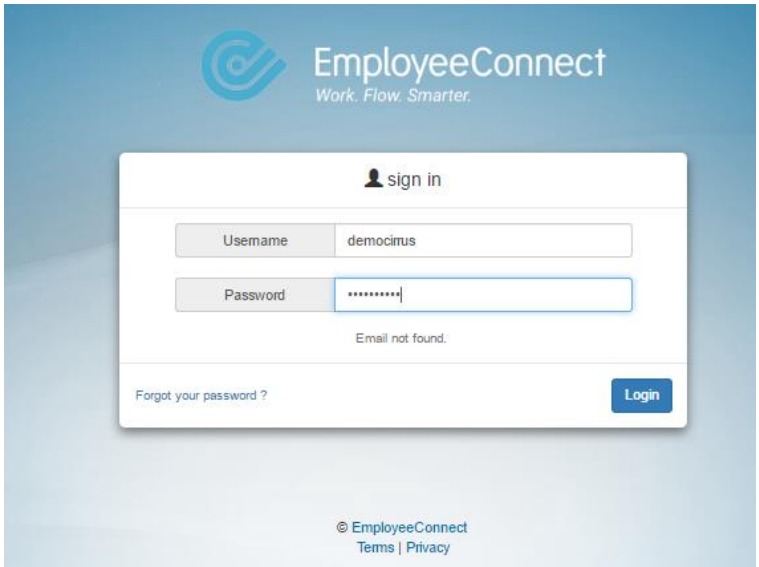
Getting Started

A manual designed to help individuals get started using EC

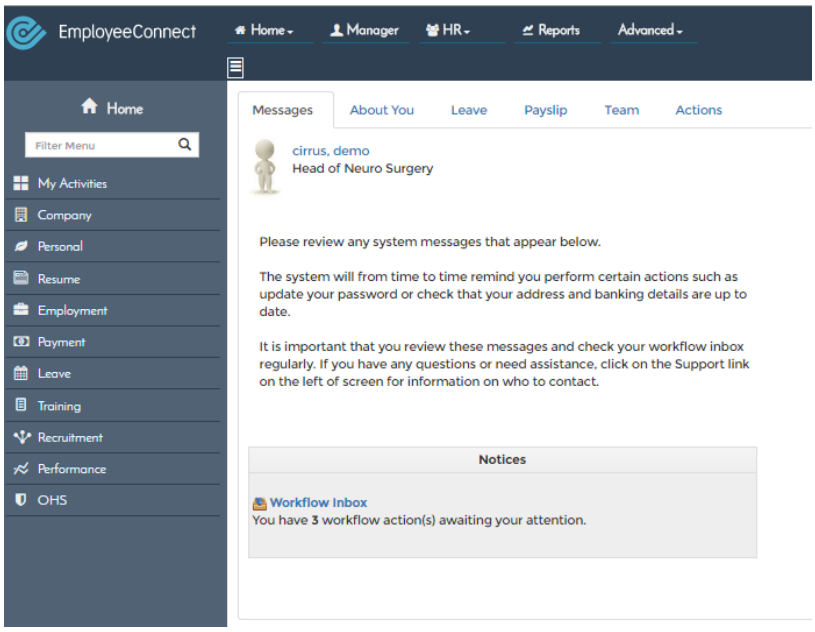
Login

Use the information in your recently received email to login through

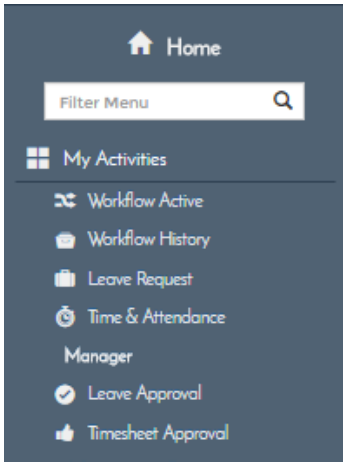
https://www.datakiosk.com.au/login.aspx



You will have the Home Page displayed with the most commonly used links as tabs. The Left Hand menu will provide links to all of the areas of the system for your personal information.



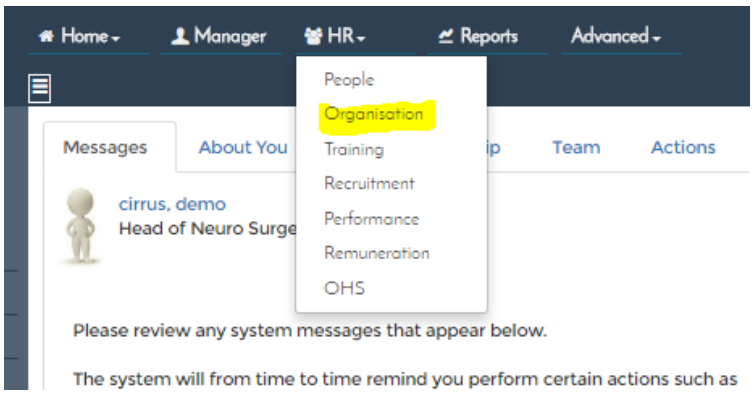
The My Activities link will take you to your workflow, leave requests and timesheets for yourself and if you are a manager to Leave Approval & Timesheet approvals for your reportees.



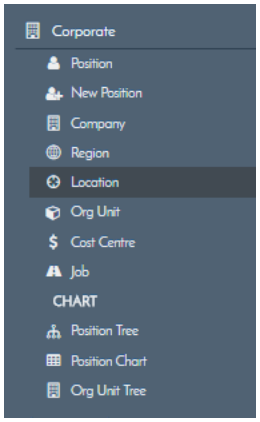
Organisation

Once you have logged in and confirmed your own information, the next step is to create your company structure.

Click on the Organisation link on the HR Menu.



You will need to define the required components to define your organisation.



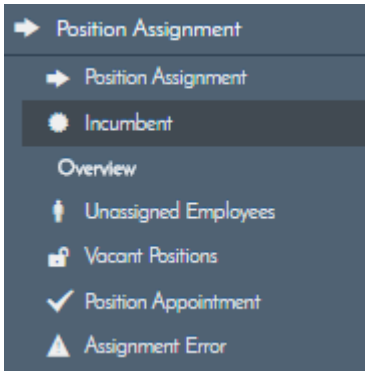
The recommended order is as follows:

1. Company – the legal entities
2. Region – geographical
3. Location – offices, sites etc
4. Org Units – the most commonly used search function – can be the same as companies and locations but might also include departments and teams. When positions are defined they will be assigned to an org unit. Note: think about your reporting requirements so that your org unit definition will be most effective.
5. Cost Centre – usually used for accounting purposes (not required)
6. Jobs – work roles (not required) e.g. accountant
7. Positions – Create new positions using your previously defined Company, Region Location and Org Unit pick lists as required. Start at the top and work down as each position must report to a position to resolve the hierarchy for reporting and approvals. It is recommended that you define 1 to 1 ie 1 person will be assigned to 1 position as opposed to 1 position with 10 people assigned. Generally, there is something different for each position ie Accountant – Sydney and Accountant-Brisbane are in different locations and probably different Org Units.

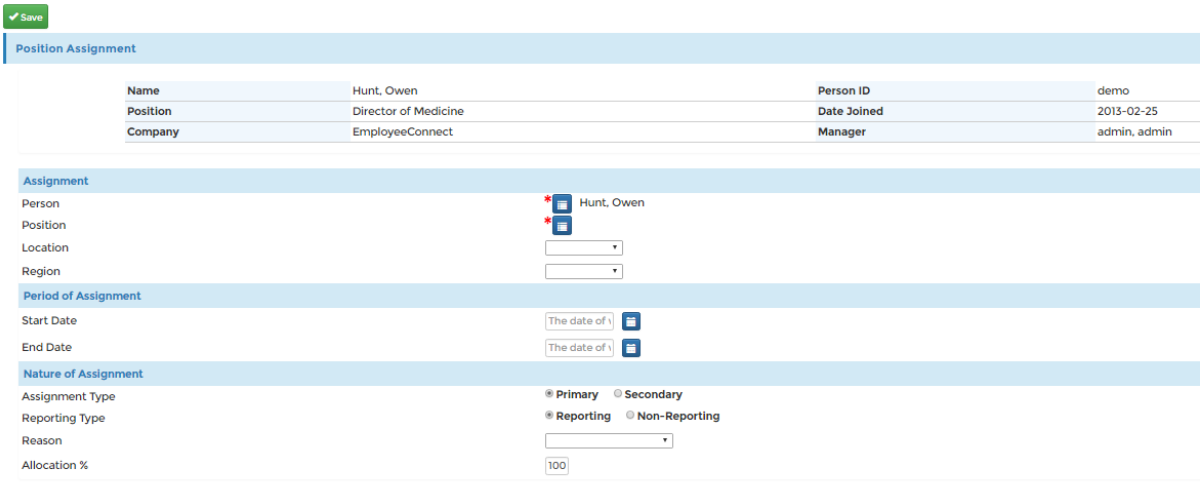
Once you have defined your positions, check the Charts to ensure your organisational structure is correct.

Position Assignments

Once you have defined your positions, the next step is to assign the people to their correct position.



Use the position assignment link to do this. A list of your employees will be displayed with a New Icon. Click to add a new assignment record.



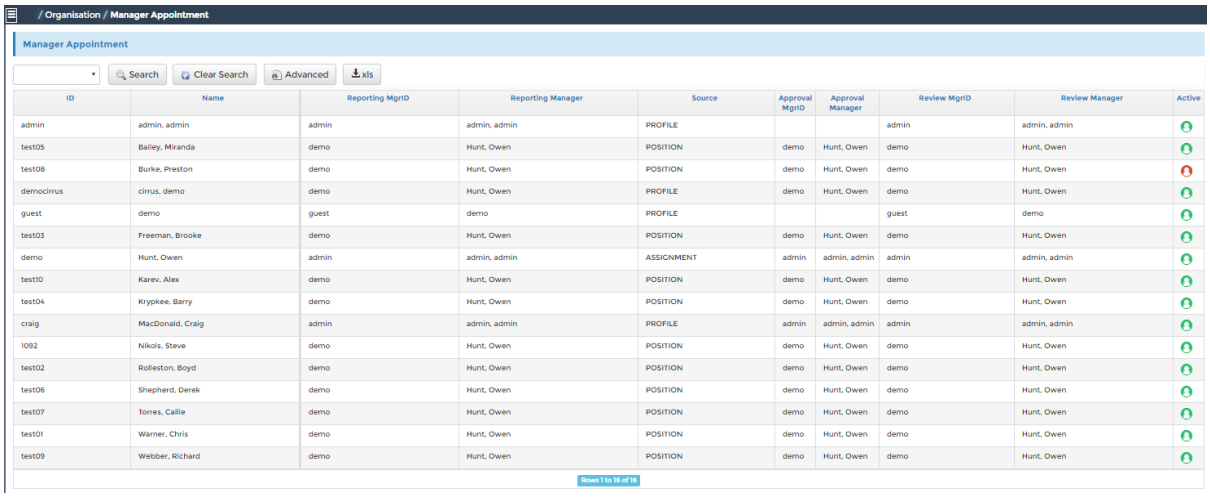
The only mandatory fields are the person and the position. The rest of the information is useful for reporting. The start and end dates will be useful if you want to have historical reporting relating to positions and people. The assignment type will default to primary and the reporting type will default to reporting. If a person is actually assigned to more than one position, then only 1 assignment record can be primary, any others should be flagged as secondary. Ie someone works 60/40 for 2 org units.

Use the Position Appointment report to review and validate that your employees are in the correct positions.

Managers

When your employees have been assigned to their positons, the next step is to confirm the Manager Reporting and Approval lines are correct.

Use the Manager Appointment link to view the existing resolution of your employees' managers.



ID	Name	Reporting MgrID	Reporting Manager	Source	Approval MgrID	Approval Manager	Review MgrID	Review Manager	Active
admin	admin, admin	admin	admin, admin	PROFILE			admin	admin, admin	
test05	Bailey, Miranda	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
test08	Burke, Preston	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
democirrus	cirrus, demo	demo	Hunt, Owen	PROFILE	demo	Hunt, Owen	demo	Hunt, Owen	
guest	demo	guest	demo	PROFILE			guest	demo	
test03	Freeman, Brooke	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
demo	Hunt, Owen	admin	admin, admin	ASSIGNMENT	admin	admin, admin	admin	admin, admin	
test10	Karev, Alex	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
test04	Krypkee, Barry	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
craig	MacDonald, Craig	admin	admin, admin	PROFILE	admin	admin, admin	admin	admin, admin	
1092	Nikols, Steve	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
test02	Rolleston, Boyd	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
test06	Shepherd, Derek	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
test07	Torres, Callie	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
test01	Warner, Chris	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	
test09	Webber, Richard	demo	Hunt, Owen	POSITION	demo	Hunt, Owen	demo	Hunt, Owen	

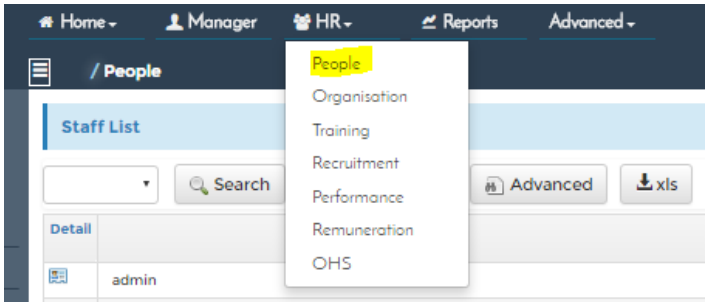
It is expected that the source will be POSITION to start with, based on the organisational Structure you have defined.

You will only need to create Manager Assignment records if an override is required ie the review manager is different to the approval manager.

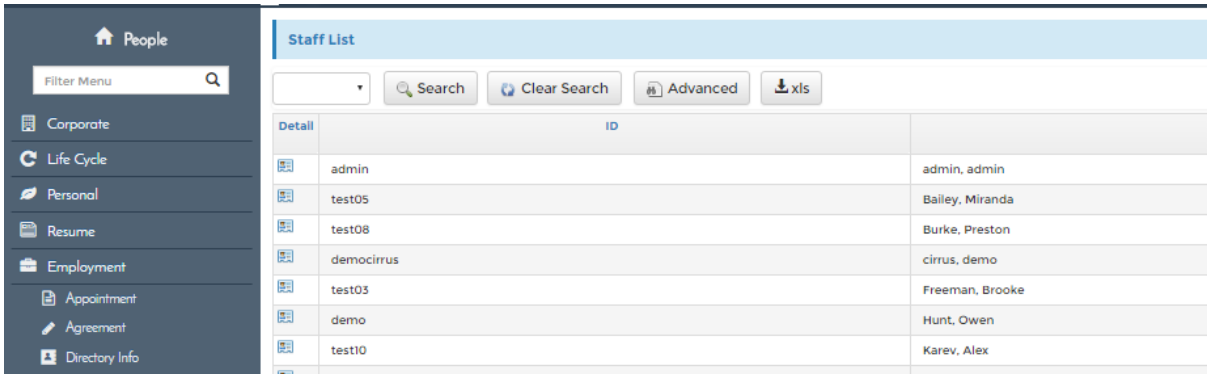
HR People

After completing and confirming your organisational structure and reporting lines, you will need to update the information held in the system for your employees.

Use the People link on the HR top menu to access all your employees' data.



A listing of your employees will be displayed and the left hand menu will be refreshed to give you access to the various links to any available data for the employees.



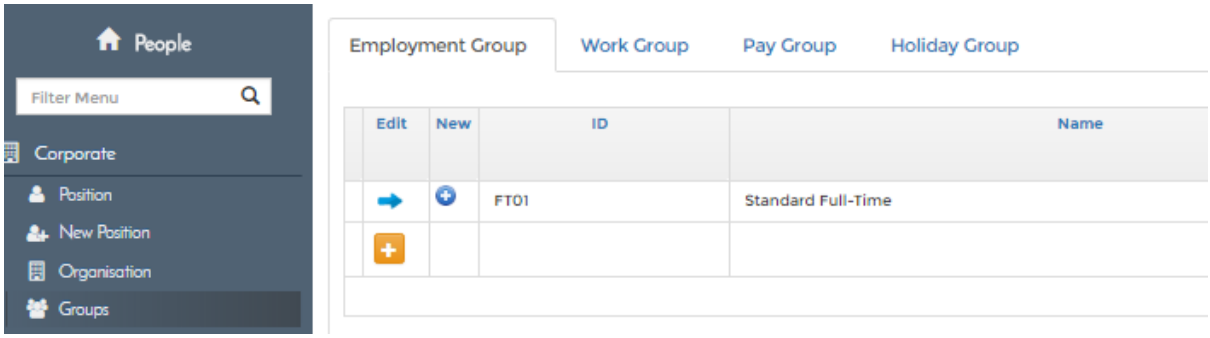
Clicking on the detail icon of the staff list will give you a read-only overview of the data held for the selected employee.

To add or update data for an employee, use the left-hand menu links.

Corporate

Prior to completing Employment agreements for your employees, you will need to ensure you have defined all the required *Groups.*

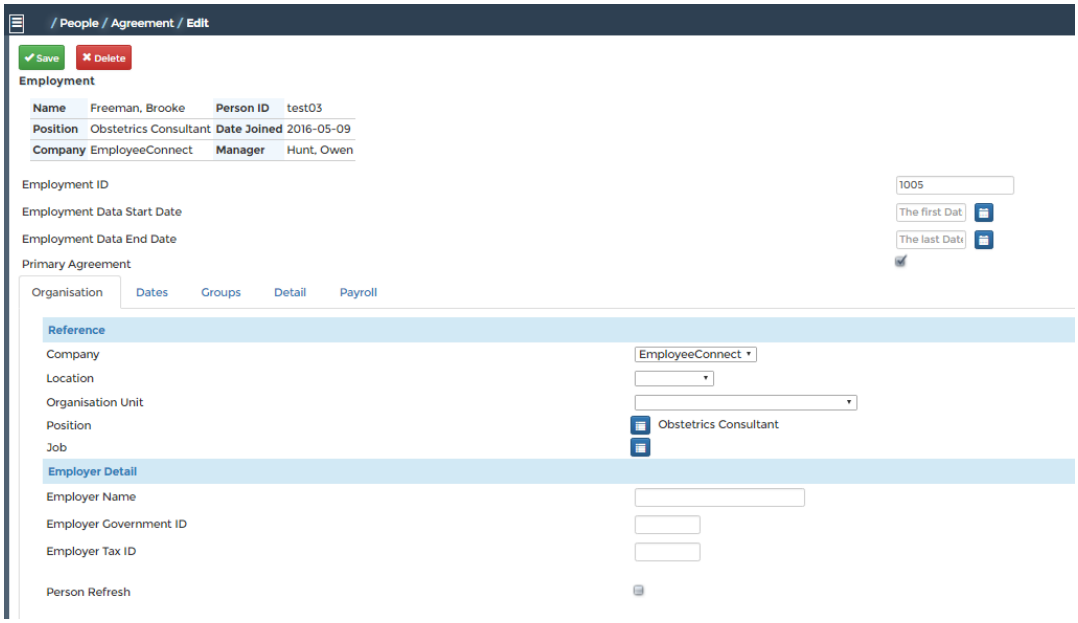
Use the Groups link in the Corporate section of the People menu to do this.



Please define any required Employment, Work, Pay & Holiday groups that will be required for your employees.

The Agreements link in the Employment section will display a list of your employees with a New Icon. Click to add a new Agreement record.

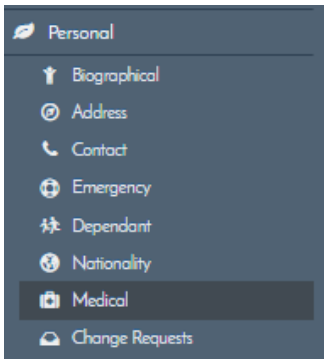
The Agreement record is comprised of 5 tabs and may be pre-populated in some areas from a data load or payroll integration.



Complete as much of the record as you can giving special attention to the dates & groups tabs as the information held there has direct effects on the calculation of leave durations on leave requests for the employee.

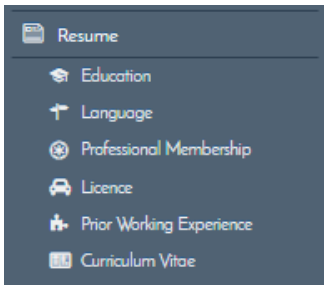
Personal

The Personal section of the People menu contains a number of links that you can use to view or update personal data for your employees.



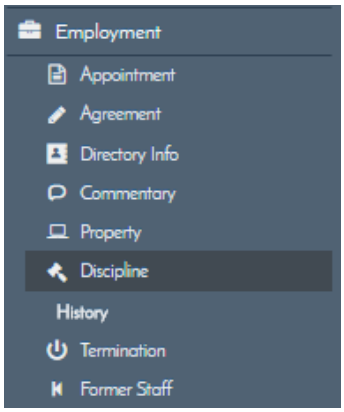
Resume

The Resume section of the People menu contains a number of links that you can use to view or update resume related data for your employees.



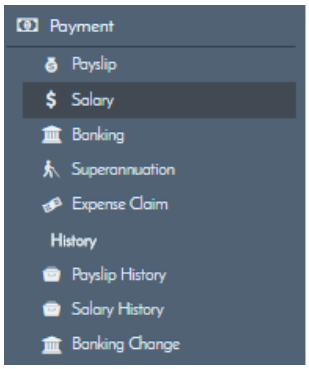
Employment

The Employment section of the People menu contains a number of links that you can use to view or update employment related data for your employees.



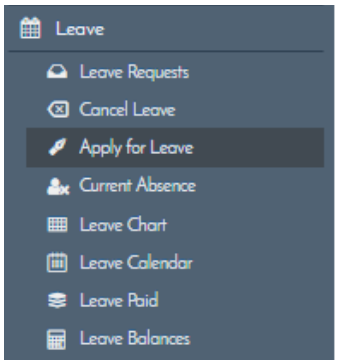
Payment

The Payment section of the People menu contains a number of links that you can use to view or update payment related data for your employees.



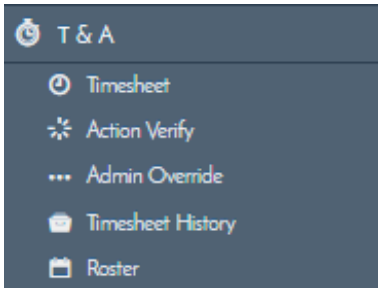
Leave

The Leave section of the People menu contains a number of links that you can use to view or update leave related data for your employees.



T & A

The T & A section of the People menu contains a number of links that you can use to view or update timesheet data for your employees.

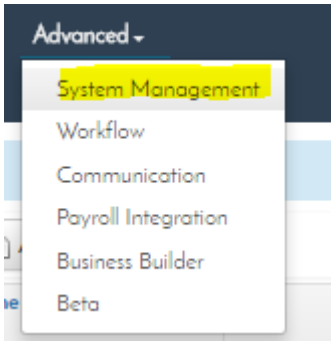


Please note that the majority of the links available to an HR or System Administrator on the HR People menu are also available to employees assigned a security level of '*Manager*' but the employee lists are filtered to include only those employees that report to that manager.

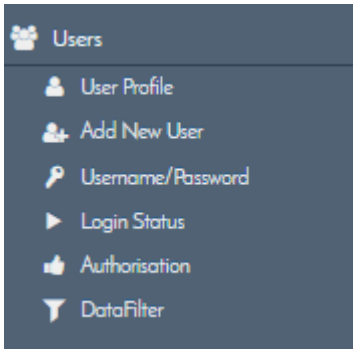
User Access

As an administrator, you can opt to have employees logging in to the system immediately and updating their own data or you can wait until you have confirmed the reporting lines and managers etc and then give the employees access.

Either way, you need to assign the correct security level to each employee. This is done through the System Management link on the Advanced Top Menu link

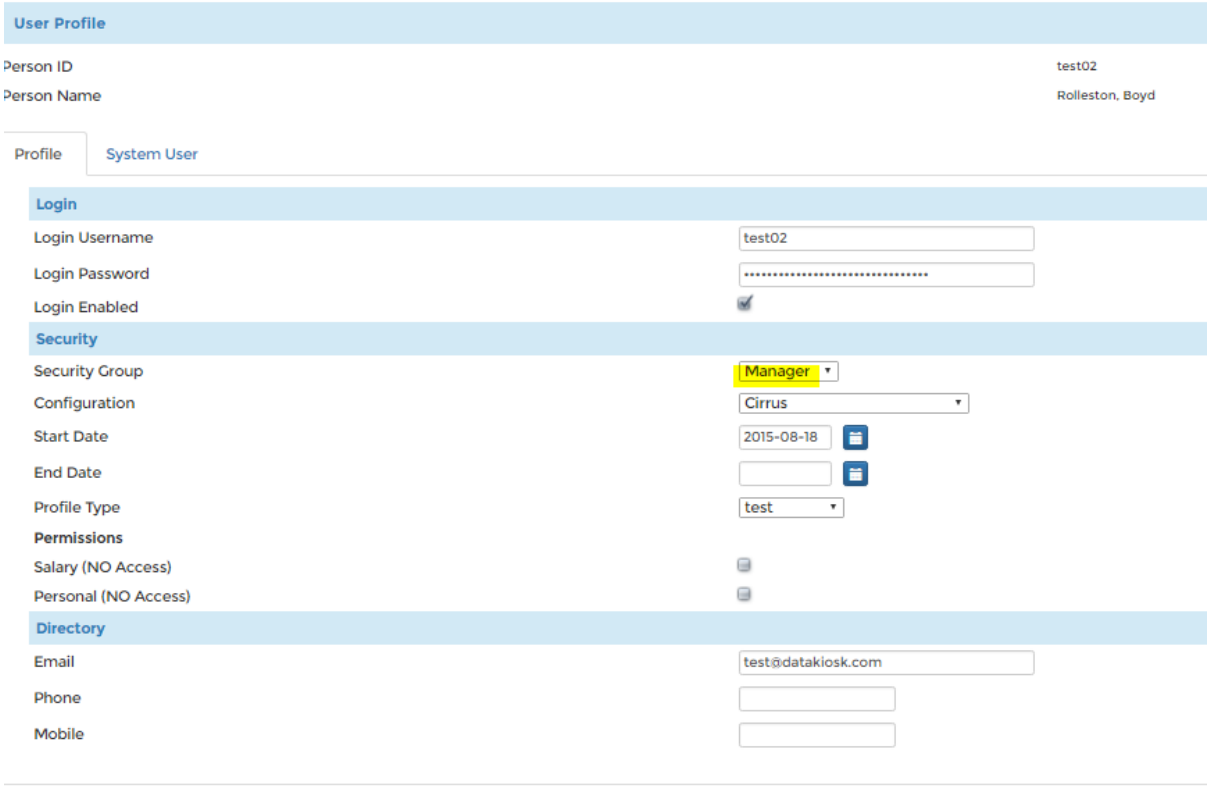


Use the User Profile link to edit your employee profile records.



By default, all the employees will have their Security Group set to '*Employee*' .

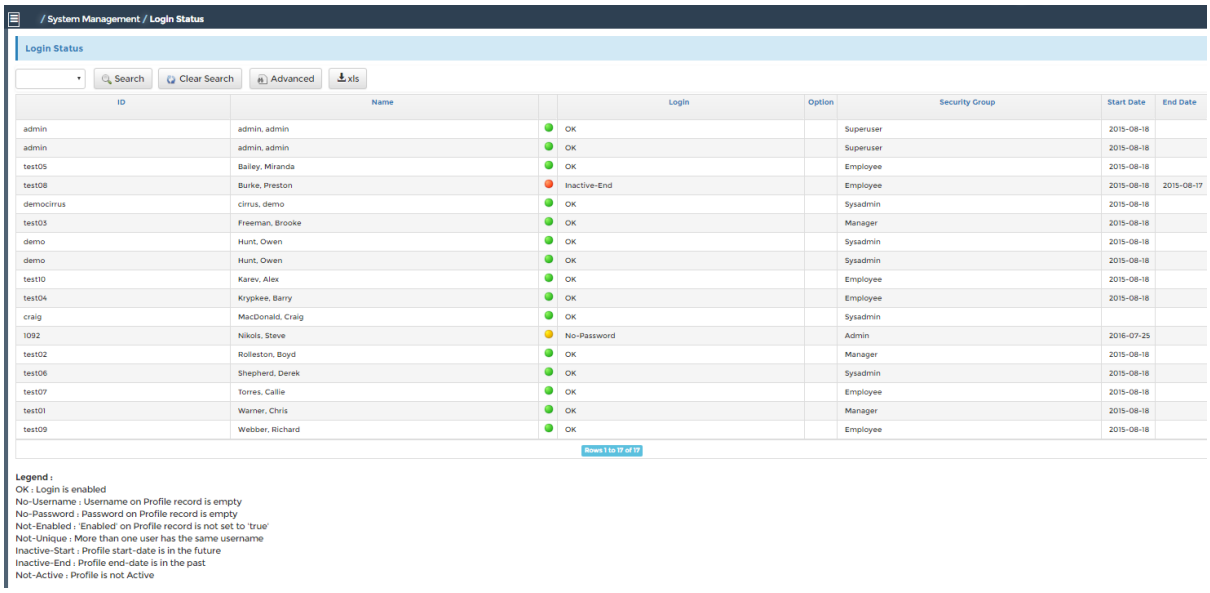
Select the  icon to update any employee that is a '*Manager*' ie has employees reporting to them.



Update the Security Group to be '*Manager*' and Save the record.

Login Status

Use the Login Status report to confirm all your employees will now be able to login.

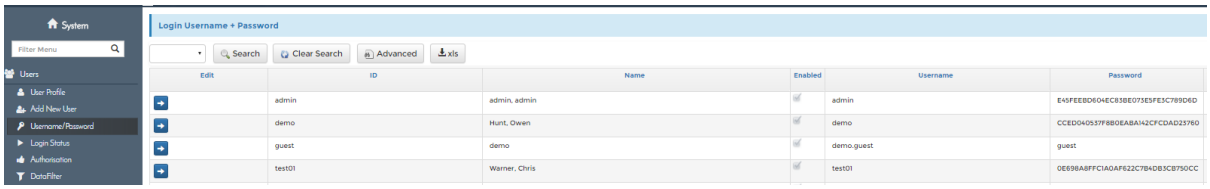


ID	Name		Login	Option	Security Group	Start Date	End Date
admin	admin, admin		OK		Superuser	2015-08-18	
admin	admin, admin		OK		Superuser	2015-08-18	
test05	Bailey, Miranda		OK		Employee	2015-08-18	
test08	Burke, Preston		Inactive-End		Employee	2015-08-18	2015-08-17
democirrus	cirrus, demo		OK		Sysadmin	2015-08-18	
test03	Freeman, Brooke		OK		Manager	2015-08-18	
demo	Hunt, Owen		OK		Sysadmin	2015-08-18	
demo	Hunt, Owen		OK		Sysadmin	2015-08-18	
test10	Karev, Alex		OK		Employee	2015-08-18	
test04	Krypkee, Barry		OK		Employee	2015-08-18	
craig	MacDonald, Craig		OK		Sysadmin		
1092	Nikols, Steve		No-Password		Admin	2016-07-25	
test02	Rolleston, Boyd		OK		Manager	2015-08-18	
test06	Shepherd, Derek		OK		Sysadmin	2015-08-18	
test07	Torres, Callie		OK		Employee	2015-08-18	
test01	Warner, Chris		OK		Manager	2015-08-18	
test09	Webber, Richard		OK		Employee	2015-08-18	

The legend at the bottom will advise you of any issues that might need correction.

Passwords

To enable employees to login, they will require a password. This can be achieved in one of 2 ways. If they have a valid email address on their profile record, they can request a password from the login screen. If there is no valid email address, you will need to create a password for them using the User Name & Password link in the Users section of the System Menu.



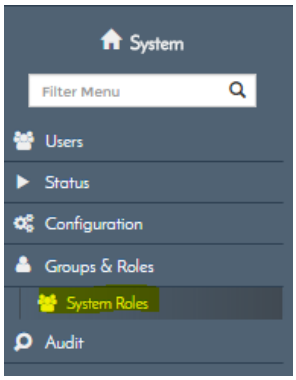
Select the  icon to update any records that need a password set. Enter a password and save the record.

Note: Do not Use the Verification data field at this time.

Groups and Roles

To enable workflow to be generated and assigned correctly, there is some configuration to be done initially.

Use the System Roles link in the Groups & Roles section of the System Menu.



The standard list of workflow roles will be displayed.

/ System Management / System Roles

System Roles

Search | Clear Search | Advanced | xls

Edit	Role	ID	Name	Position	Company Filter	Region Filter	Location Filter	OrgUnit Filter	Description
	Admin-Group	admin	admin, admin						
	Building Security	admin	admin, admin						
	Building_Security_Group	admin	admin, admin						
	Document Publishing Administrator	admin	admin, admin						
	ER Administrator	admin	admin, admin						
	General_Manager	admin	admin, admin						
	HR_Group	admin	admin, admin						
	IT Manager	admin	admin, admin						
	IT_Group	admin	admin, admin						
	OHS_Admin	admin	admin, admin						
	Payroll_Group	admin	admin, admin						
	Property Administrator	admin	admin, admin						
	Remuneration_Admin	admin	admin, admin						
	Training_Admin	admin	admin, admin						
	TxMonitor	admin	admin, admin						
	Workflow Default User	admin	admin, admin						

Please edit each of the roles to assign the correct person. Additional roles can be created utilizing the various filters. Ie you could have more than one Payroll Group – a different person for each location or company. There are no ligmitations on the number of roles that can be defined using the supplied '*Role*'

All Aboard

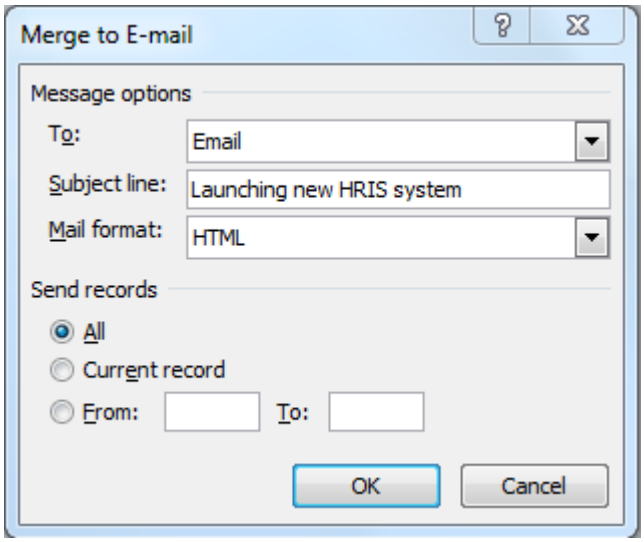
Having completed all of the above steps, it is time to give your employees access to the system. The most common way of doing this is to by email using the merge facility.

Prepare your recipient list

1. Login to your database as an Admin User
2. Go to System Management – Logins – Username & Password
3. Use the xls export icon
4. Open the export file
5. Check that your data is displayed and all records have an email address included
6. Use the Save as function to save the file in a convenient location.

Prepare your email merge

1. Review the Template provided making any required changes in the Text
2. Use Select Recipients icon to link to your saved spreadsheet
3. Click on the Finish & Merge icon to initiate the email merge



4. Be aware your email host may have restrictions on the number of emails you are able to send within a given time period e.g. hour

Sample Email Template

Dear «Name»,

We are launching our new HRIS system next week and would like to inform you how to access this new system.

As this is an internet based system, you will need to open your Web Browser (preferably Chrome or Firefox) and go to https://www.datakiosk.com.au/login.aspx

You will be on the login page and need to enter your username and password as follows

Username: «Username»
Password: «Password»

You will be forced to change your password before proceeding.

Then use the new password to access the system for the first time.

Please go to the Home menu and check your own information and update as needed.

If you have any questions or need further assistance, please click on the support link in the Directories section of the Home Menu.

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