EmployeeConnect

Work. Flow. Smarter.

Publishing and Policy Acceptance Manual

Contents

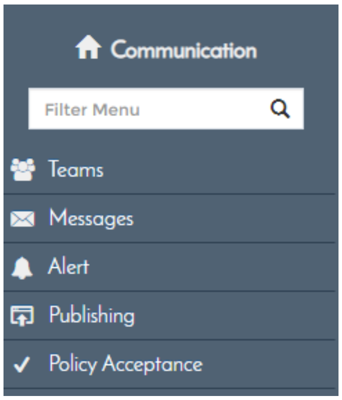
Introduction

EmployeeConnect is cloud HRIS software that allows employees to manage their personal and work information, all in one easy to access and safe place.

This document provides a general overview of the Policy Acceptance feature. We aim simplify the process and eliminate the need for paper-based form of policy acceptance. EmployeeConnect gives you the tools you need to upload your policies and send them across your employees all in one cloud based HRIS platform. This document will walk you through the entire process from uploading the policy, sending to the desired audience, updating and monitoring the policy acceptance.

Communication Module

The Communication Module allows you to set document folders, upload files and policies and manage these documents from EmployeeConnect, policy acceptance is also found here. Navigate to Advanced > Communication > Publishing to access the Communication and Publishing page to manage your documents and Policies.



Publishing

Contains the Document Admin, Folder Admin and New Document links used to manage your files and policies.

Document Admin – click this link to view a report of all the files and folders uploaded in the Communications Module

Document Properties

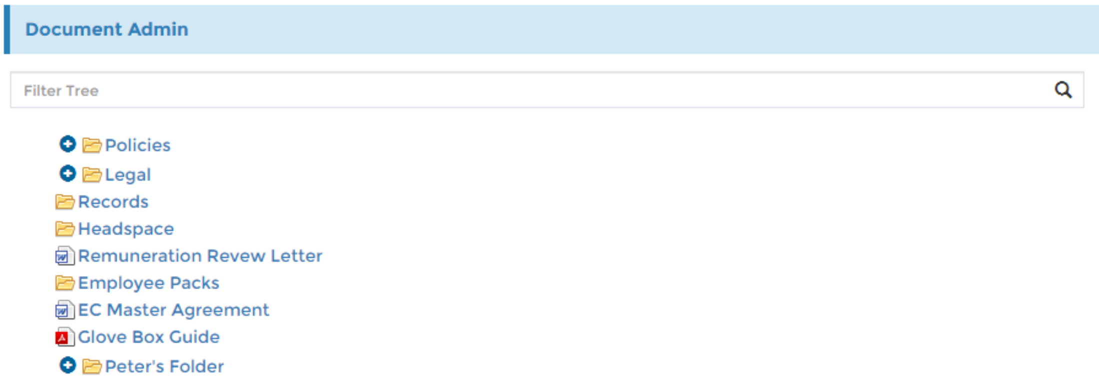
Search | Clear | Advanced

Properties	Doc Name	Category	Folder	File Name	Published
	Policies	FOLDER			✓
	Legal	FOLDER			✓
	Headspace	FOLDER			✓
	Peter's Folder	FOLDER			✓
	Anti-Discrimination and Equal Employment Opportunity Policy	FILE	Policies	Anti-Discrimination and Equal Employment Opportunity Policy.pdf	✓
	Computer Email and Internet Policy	FILE	Policies	Computer Email and Internet Policy.pdf	✓
	Copyright Notice	FILE	Legal	Copyright.htm	✓
	EC Master Agreement	FILE		EC Master Agreement.docx	

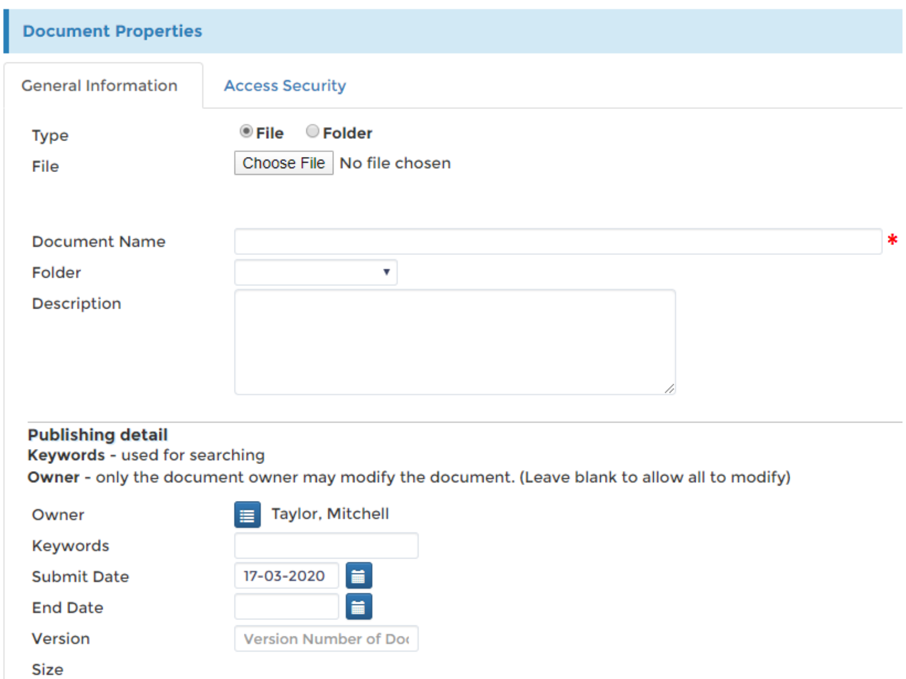
This report allows you to also click on the individual files and folders to either modify, update or delete them entirely from the publishing page.

Doc Name – File or folder name you assigned to this item when creating the file/folder.
Category – Determines if the item is a file or a folder.
Folder – Displays where the file/folder is located or nested under if using several folders.
File Name – Actual file name the file has when it was saved including the ext name.
Published – Checked ticked box means the file/folder is published and can be seen in EC, unmark means it is saved but will not be seen anywhere than from this page where the file is managed.

Folder Admin – Click on this link to view the folder and file structure showing you exactly where your file is nested. If you are familiar with the Org tree or position tree then this will feel like home. You can click on the + button before the folder icon to collapse the tree and expose the child folders. Each of the folders or files here can be clicked to edit, update or delete the said file/folder. Use the Search bar under the section label to quickly search for a specific file or folder.



New Document – Click this link to upload a new folder or file. This page has the General Information tab and Access Security tab.



General Information – Select what to create, File or a Folder to put files in. Please note that selecting a folder and uploading a file will treat that object as a Folder and ignore that file you selected to upload. Make sure to select the correct Type when creating a folder or uploading a file.

Publishing detail section from General information dictates the following:

Owner – This will be the person creating the file/folder, another resource can be selected from the picklist. Whoever is set as the owner will be the person with the sole privilege of managing the specific file. Leave this blank to allow anyone to change the file.

Keywords – Input keywords to associate to your files and make them easier to find when doing a search. Separate with a comma without spaces.

Submit Date – Date when file/folder is created. Leave as default or modify as needed.

End Date – Set a date here if you want to expire the publishing setting and take this document off the list. Leave this blank if you want the file to be there indefinitely.

Version – You have the option to input a version number here to keep track of the changes you done to the document. This allows you to just input the version number instead of having to rename the file every time any changes are made.

Access Security – Set your files to published to make them available and set your audience.

Published – Tick this box to make your files active and accessible in EC, if unticked, the document will be managed here on the publishing page but will not be visible anywhere else.

Scope – Select where to make the file available. Publishing to make it available in Core HR, Remuneration if you want it to appear on the Remuneration module, Performance if you want to make it available from the performance module, On boarding if you want it to be seen when on the on boarding site. Select Publishing and Onboarding if you want it to be seen on the core HR and onboarding site.

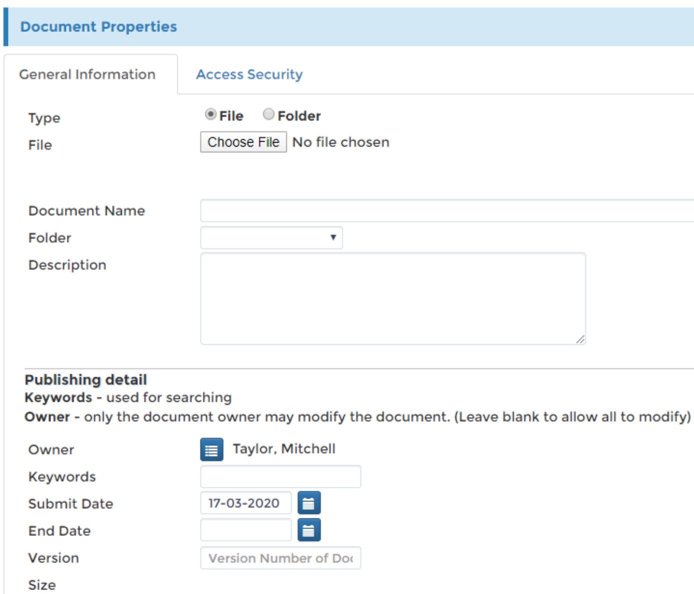
Allow Access – Select who will be able to access the file.

Deny Access – Disallow access to groups or profiles here.

How to Upload Policies

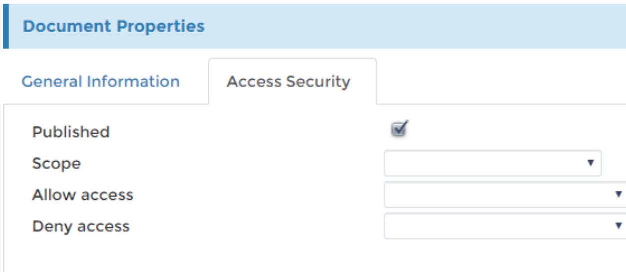
Follow the steps below to upload your Policies in EmployeeConnect.

1. Click Advanced > Communication > Publishing > New Document



2. Set Type to File
3. Click the Choose File button to open file explorer and locate your Policy
4. Input the Name you wish this file to have in EmployeeConnect in the Document Name field
5. Select a folder to nest this file in from the Folder drop-down list
6. Enter a description for this file on the Description text area
7. Select a resource from the Owner pick list or leave as default to allow anyone to edit the file
8. Enter Keywords to help ease searching for this file or policy
9. Input a Submit date to make the file available starting from that date
10. Input an End date to expire the file and take it down after that date or leave it blank to make it available indefinitely
11. Input a version if this is an old file and you are making modifications/updates

12. Click Access Security



13. Tick Published tick box to make sure this will be available and seen when saved
14. Select where to publish this from the Scope drop-down list
15. Select who will be able to access this file from the Allow Access drop-down list
16. Optionally select whom to restrict access from the Deny Access drop-down list

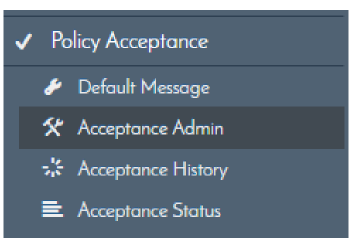
How to Select Policy Audience

Policies can be sent and made available from the Home Menu accessible to all Employees when they logon EmployeeConnect. They can also be made available as part of the new employee on boarding process and be an additional requirement before the employee is migrated to the EmployeeConnect Kiosk.

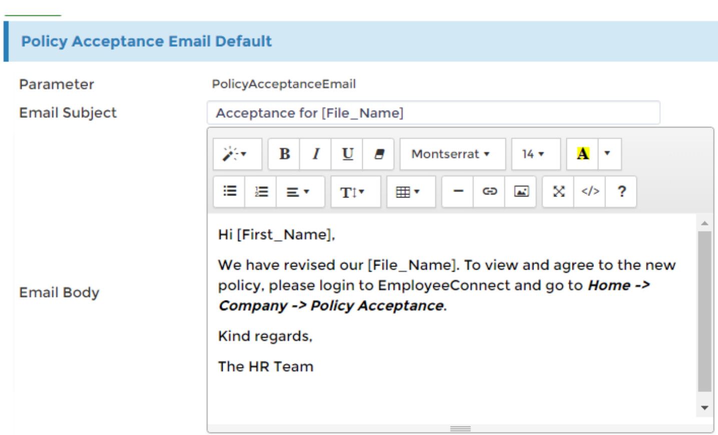
Sending the policy to the employee On boarding is as easy as following the steps described on How to Upload Policies and selecting On boarding as the Scope. This will make the policy available on the on boarding site for all new employees to read and accept. More information on the onboarding site and process can be seen from the on boarding guide available from the EmployeeConnect Knowledgebase site.

How to Send New Policies to Existing Employees

This can be done via Policy Acceptance. There are several links and functions found in the Policy Acceptance feature of EmployeeConnect these are all discussed below:

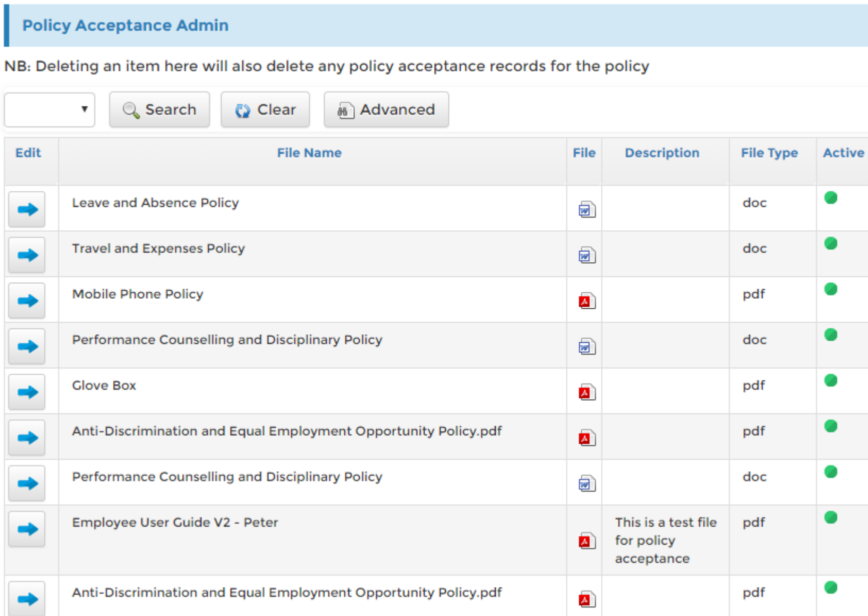


Default Message – Configure your default Policy Acceptance Message here. We merge fields here and the the obvious substitutions are enclosed with the brackets.



Acceptance Admin – Click this link to setup the new policy for employees to accept. Follow the steps below if you want to send a new policy, to an already active Employee.

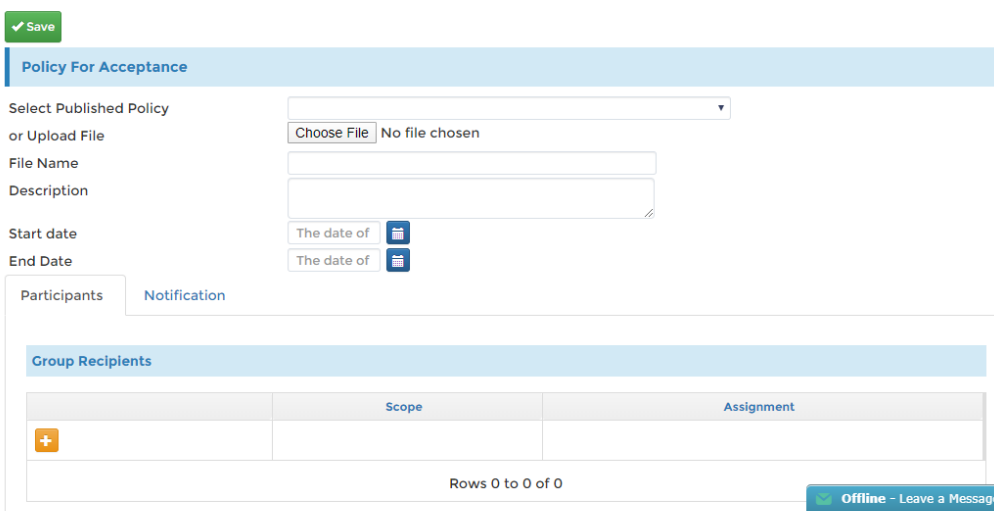
1. Click Advanced > Communication > Policy Acceptance
2. Click Acceptance Admin



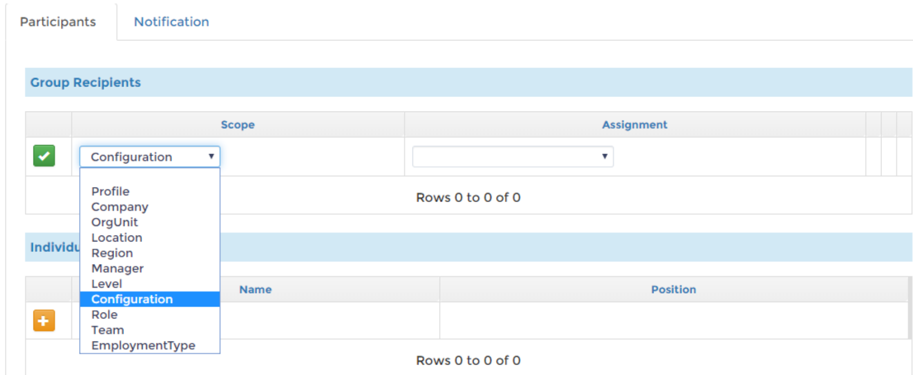
Edit	File Name	File	Description	File Type	Active
	Leave and Absence Policy			doc	
	Travel and Expenses Policy			doc	
	Mobile Phone Policy			pdf	
	Performance Counselling and Disciplinary Policy			doc	
	Glove Box			pdf	
	Anti-Discrimination and Equal Employment Opportunity Policy.pdf			pdf	
	Performance Counselling and Disciplinary Policy			doc	
	Employee User Guide V2 - Peter		This is a test file for policy acceptance	pdf	
	Anti-Discrimination and Equal Employment Opportunity Policy.pdf			pdf	

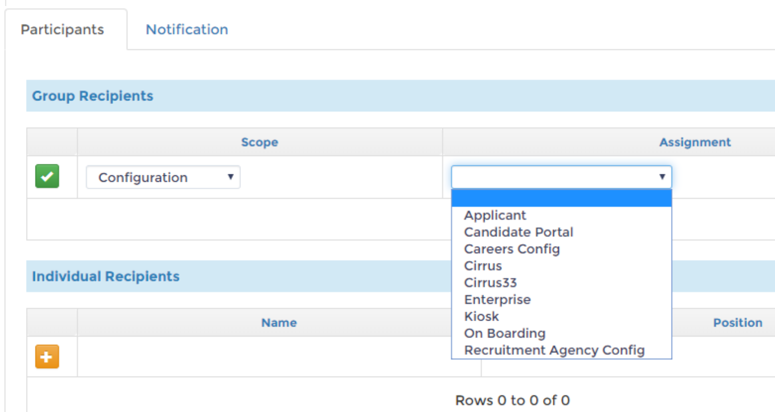
You will see Policies and files sent through the Policy Acceptance Admin here. Note that these are not all your Policies but those sent from this feature.

3. Click the + Plus button to open the Policy for Acceptance form seen below:

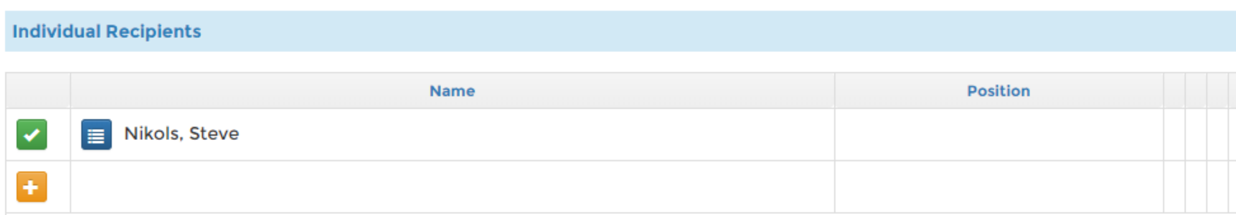


4. Click the Select Published Policy drop-down list to select an existing Policy or
5. Click the Choose File button to select a new file to upload and have the employee accept
6. Input a File Name to display when the file is viewed in EmployeeConnect
7. Enter a Description to describe your file and distinguish this from the other policies, instructions come to mind
8. Enter a Start Date to set when this file becomes available
9. Set an End Date to make this expire or take down the policy, leave blank to make this available indefinitely
10. Click the + button to select Group recipients, see the sample below or



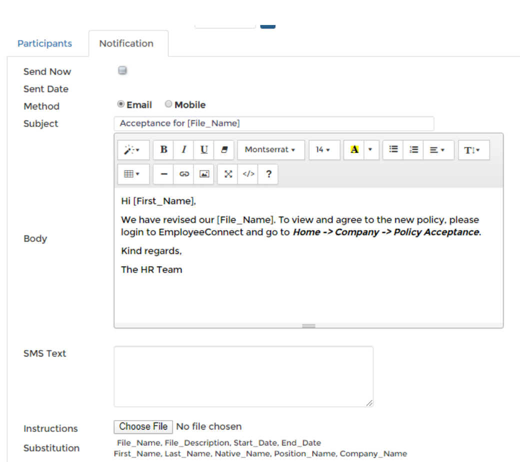


11. Click the + button under the Individual Recipients to select individual recipients



Note you can select a combination of Group and Individual, this is helpful if you want to send it to a specific group and a resource that is not within that group.

12. Click Notification to send an email or sms to the selected recipients



13. Tick either Email or Mobile to send the notice via that option
14. Enter a Subject for this notification, this has been configured for substation and the fields are indicated below see section: Substitution
15. Enter your message in the Body field, this also uses merge fields
16. Remember to input your message on the SMS text text area if you choose to send the notice via SMS. Your SMS will be empty if you leave this blank and send the notice via SMS
17. Tick the Send Now tick box, this is a requirement to send the notice out

Acceptance History – you can view a report listing all the Policies, Acceptance dates, Employees who accepted the policy and other related information here.

Policy Acceptance History

Search Clear Advanced xls

ID	Name	Policy	Policy	Date Accepted	Status	Record	Position	Manager ID	Manager	Active
admin-aad	Admin, AAD	Mobile Phone Policy					Chief Financial Officer	democirrus	Taylor, Mitchell	
admin-aad	Admin, AAD	Glove Box					Chief Financial Officer	democirrus	Taylor, Mitchell	
1096	Amodeo, Daniel	Glove Box					Business Development	1146	Pollero, Fred	
1135	Angus, Paul	Mobile Phone Policy					Chief Technical Officer	democirrus	Taylor, Mitchell	
1135	Angus, Paul	Glove Box					Chief Technical Officer	democirrus	Taylor, Mitchell	

Acceptance Status – Click this link to see the status of the policies you sent to employees for acceptance. This report shows the Policy Name, employee number who got sent the policy, number of employees who accepted the policy vs the number who have not accepted it, the date the Policy was sent out under the start date and the end date set for this policy acceptance.

Where Do Employees Access Policies

Employees can access the policies sent for their acceptance from Home > Company > Policy Acceptance. See the screenshot below for the report listing of the policy samples for the test employee to Accept.

Assigned Policy Acceptance

Title	Policy	Accept	Acceptance Date
Employee User Guide V2 - Peter			
Glove Box			
Mobile Phone Policy			

Rows 1 to 3 of 3

How to Accept the Policy

Employees can click the individual icons displayed to the right of the Policy Title. This will open a viewer to allow the user to read the Policy. Accepting the policy is as easy as clicking the Star button under the Accept column.

Assigned Policy Acceptance

Title	Policy	Accept	Acceptance Date
Employee User Guide V2 - Peter			
Glove Box			
Mobile Phone Policy			

Rows 1 to 3 of 3

Once accepted, the star icon will be shaded green and the acceptance date will be recorded.

Title	Policy	Accept	Acceptance Date
Employee User Guide V2 - Peter		★	17-03-2020 17:52
Glove Box		☆	
Mobile Phone Policy		☆	

Rows 1 to 3 of 3

The Employee Acceptance will also be recorded and reflected from the Policy Acceptance Status report available to the admin.

Policy Acceptance Status

Search Clear Advanced xls

Policy	Policy	Assigned	Accepted	No Response	Record	Start Date	End Date
	Glove Box	45	0	45	●		
	Mobile Phone Policy	44	1	43	●		
	Employee User Guide V2 - Peter	1	0	1	●	17-03-2020	

Rows 1 to 3 of 3

This is the view prior to the acceptance and the view below will be after the employee has accepted the policy.

Policy Acceptance Status

Search Clear Advanced xls

Policy	Policy	Assigned	Accepted	No Response	Record	Start Date	End Date
	Glove Box	45	0	45	●		
	Mobile Phone Policy	44	1	43	●		
	Employee User Guide V2 - Peter	1	1	0	●	17-03-2020	

Rows 1 to 3 of 3