# PurelyHR

# Administrator Guide

Frequently Asked Questions & Answers

**ironflow**
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# ○ Introduction

## How to Login to PurelyHR

To log into the system, go to http://www.purelyhr.com, and click on the "**Login**" button in the top right corner of the page or select "**Get Started**" from the **Welcome Email** you received when your account was created.

Here's how to action the Welcome Email:

1.  Select the link "Get Started Now".
2.  After selecting the link, you will need confirm your email and create your new password.
3.  Select "Update"
4.  After this is done, it will ask you to go back to the login page.
5.  From there you will enter your CompanyID, your Username and the new password you created. (The CompanyID and Username can be found on the Welcome email)
6.  Select Login

If you can't find your login information, please refer to the "**How to retrieve your login information**" section below.

## How to Retrieve Login Credentials

If you can't find your **Welcome Email**, you can retrieve your login information by going to the login page (instructions above) and clicking on the "**Forgot Login info**?" link. Keep in mind that this link only works if you've previously logged into the system.

# ◎ Get Started

## Staff Module

1.  **Create your Departments**

    Departments can be setup and assigned to match the structure of your company. Various settings throughout the PurelyHR modules can be assigned to an entire department. You can also assign unique colors to departments to easily identify their users in the calendar.

    - o   Select the Staff Module
    - o   Select Departments
    - o   Create Department
    - o   Choose the Name
    - o   Choose the color reference
    - o   Save

    For further information please select the following link: Creating/Assigning Departments

2.  **Create Offices**

    If your company has employees in more than one office, you can create offices within the system to classify them. By default, new users will be assigned to the Head Office.

    - o   Select the Staff Module
    - o   Select Offices
    - o   Choose the Name
    - o   Save

    For further information please select the following link: Creating/Assigning Offices

3.  **Import Paid Holidays.**

    Different **Paid Holidays** can be assigned to different offices, which is useful if your offices are spread across different countries, provinces or states having different holidays.

    - o   Select the Staff Module
    - o   Select Paid Holidays
    - o   Select Import Holidays
    - o   Choose the Year
    - o   Choose the Country
    - o   Select the Holidays to import
    - o   If needed, select the office(s) the paid holidays will be assigned to.

o   Select Import.

For further information please select the following link: <u>Paid Holidays</u>

### 4.  Set Default Module Access

Enable default access to automatically give new users access to certain modules. Disable default access for a module to manually give new users access to that module.

Packages are automatically increased as users are added.  They can be manually decreased as users are removed from a module.

- o   Staff Module
- o   Module Access
- o   Manage User Access (green icon) next to the desired module
- o   Select Users who should have access / Deselect those who should not

For further information please select the following link: <u>Module Access</u>

### 5.  Create Users

The easiest and recommended way to create your users is by downloading a CSV template from our Staff Module.

- o   Select the Staff Module
- o   Import/Update Users
- o   Choose Import Users
- o   Select the optional columns you'd like to include in addition to the mandatory columns
- o   Select "Download Template" to download the CSV template file to your computer. The columns selected, will be automatically added to the template.
- o   Open the template in your favorite spreadsheet editor, like Microsoft Excel or Google Sheets. You should see a single row, called the header, with the selected columns
- o   Fill in your user information. If you are importing users from another system, make sure to match the data to the correct columns.
- o   Once you've added your data to the spreadsheet, save it in CSV format. The file extension should be ".csv".
- o   Select the "Choose a file..." button, and select your CSV file to upload your file. You will get a chance to review the changes before applying them to your account.
- o   Review and Confirm the information.
- o   Select "Import".

Select the following link to know how to add one user at a time: <u>Create Users</u>

6. Review your Account Settings

- o Select the Staff Module
- o Account Settings
- o Change options as desired

## Time-Off Module

### 1. Create and Review Time-Off Types

Time-Off Types are used to categorize the different reasons why your employees are requesting time off. Time-off Type examples can be Vacation, PTO, Personal Day, Sick Day, Bereavement, FMLA, etc. The system allows you to create as many time-off types as you need.

- o Select the Time-Off Module
- o Settings
- o Time-Off Types

You can add **Deductible** or **Non-Deductible** Time-Off Types.

**Deductible** time-off types are time-off types that you can assign to a user, with a yearly allowance and a balance. When requests are made with this time-off type, hours or days are deducted from the user's bank, so they are limited on the number of requests they can submit per year.

**Non-deductible** time-off types are time-off types which are not associated with a yearly allowance and balance. In other words, if enabled, users will be able to create unlimited time-off requests with these time-off types.

- o Add New
- o Provide a Name
- o Choose the Color Reference
- o Deduct hours from a bank? If this option is **Green** the time will be deducted from the users' bank when requested.
- o Select which time-off type you want to deduct from. Generally, a time-off type will deduct time from **itself**, but you still have the option to deduct from another time-off type.
- o Choose the Request Type. If you select "Partial" you can decide the increments of that request.
- o Choose if you want users to have the ability to comment on a request.
  - Yes - Optional: Comment box will be available, but leaving a comment is optional.
  - Yes - Required: Comment box will be available, and a comment is required by the user.
  - Not Available: User will not have the option to leave a comment.
- o Once all other option completed, select Create.

Select the following link for further information: Creating Time-Off Types

## 2. Create and Review Time-Off Policies

Time-Off Policies are templates which contains a group of time-off types, each with their individual settings.

Once policies are created, all time-off types within them can then be given to selected users. For instance, if by default your company allocates 10 vacation days and 5 personal days to all new hires, you can create a time-off policy to reflect this so when you add these users in the system, they will be automatically assigned all time-off types within that policy.

Using a time-off policy when creating your users will save you time. Please note that once applied to a user, modifying a time-off policy will not directly modify the user's time-off type settings. The policy will need to be re-applied to modify the user's time-off type settings.

- o   Select the Time-Off Module
- o   Settings
- o   Time-Off Policies
- o   Create New
- o   Name Policy
- o   Add Time-off Type to Policy
- o   Select the Time-Off Type to add to Policy
- o   Set Renewal Date and Yearly Allowance.
- o   Set Default Balance - if accruing, usually this will be Empty (Prorated Balance is also an option. Please refer to the **Prorated Balance** section below)
- o   Set Renewal instructions
- o   If accruing, set the interval and accrual rate
- o   Set Restriction
  - o   Balance Required (Accruals or Front-Loaded)
  - o   Allow Pre-Book - allows time-off to be requested as long as time will be accrued by the end of the year (Accruals Only)
  - o   Accrued By Date - allows time-off to be requested as long as it will be accrued by the requested date (Accruals Only)
  - o   Allow Overbook - allows users to request as much time as they want (Accruals or Front-Loaded)
- o   Add
- o   Repeat for any other time-off types that occur in that policy

To create **duplicate** policies with the same rules except for the yearly allowance, simply select "Duplicate Policy" next to your current policy and rename it accordingly. This will allow you to Edit the Policy Settings and change the Allowance.

Select the following link for further information: Time-Off Policies

### 3. Create and Review Length of Service Accruals

The Length of Service Accruals are used to automatically increase your user's allowance/balance or change their policy once they have reached a certain number of months/years of service within your company. As an example, an employee may get an extra week of vacation annually once they hit their third year of employment.

Once a Length of Service Accrual is created, it can then be assigned to one or multiple users. Each user can only be assigned one Length of Service accrual.

Our system has two types of Length of Service Accruals. One type is called "**Allowance Increase**", while the other type is called "**Policy Change**". Please refer to the corresponding sections below for more details on each type.

> TIP: If your company gives extra vacation/PTO at multiple years of services (ie at the 2nd, 5th and 10th year), then you must only create one Length of Service accrual, and add the "Vacation/PTO" time-off type 3 times within that accrual, each at their own month of service.

### Allowance Increase

The "**Allowance Increase**" method is used when you only need to increase a user's allowance, while all their other user settings stay the same. This method is mostly used when your users are NOT automatically accruing their balance on a weekly/monthly basis, or if haven't created any time-off policies within your account.

- o Time-Off Module
- o Settings
- o Length of Services
- o Allowance Increase - Add New
- o Name the Accrual and identify if anyone should be notified of this change
- o Add New
- o Select which Time-off Type will be added to
- o Select which month of service this increase will occur
- o Define how many days/hours it will increase by
- o Define how the increase will affect the balance.
  - Full -> The Allowance increase will be added to the balance in full.
  - None-> The Allowance increase will not affect the balance until the renewal.
  - Prorated-> The Allowance increase will be added to the balance but in proration if applicable.
- o Choose if the extra allowance will be rewarded on the Anniversary date or renew on the Calendar Year
- o Add
- o Assign accrual to users by going back to the Length of Services screen
- o Select the Icon with a little person with a (+) sign
- o Select the Users in question and Apply Length of Service

**Policy Change**

The "**Policy Change**" method is used to automatically "bump" a user from one policy to another, once they reach a certain number of months/years of service within your company. <u>To use this method, you must first create time-off policies, if you haven't already.</u>

- o Time-Off Module
- o Settings
- o Length of Services
- o Policy Change - Add New
- o Name the Policy Change
- o Identify if anyone should be notified of this change
- o Add Policy to Apply
- o Select the Time-off Policy
- o Select which month of service the policy will change
- o Choose if the Policy will change on the Anniversary or on the Calendar Year
- o Add
- o Assign accrual to users by going back to the Length of Services screen
- o Select the Icon with a little person with a (+) sign
- o Select the Users in question
- o Apply Length of Service

Select the following link for further information: <u>Length of Services</u>

4. **Review your Account Settings**

- o Time-Off Module
- o Account Settings
- o General, Calendar, Time-Off Request, Report, and Banked Time.

Select the following link for further information: <u>General Account Settings</u>

## ⊙ Additional Account Settings Information

## Staff Module

- o **Manager viewing employees' profile**
  - o Select how much information the managers can view in their employees' profile.

  Choose <u>Minimal</u> if managers can view only basic profile information about their employees **(their name, email address, job title, hired date, department, and office)**.

  Choose <u>All</u> if managers can view all profile information.

- o **Manager permissions**
  - o Allow Managers to edit their employees' profile. **Note that managers can only edit the profile information they are allowed to see.**

- o **Information viewable in profile**
  - o Select how much information the employees and managers can view in their own profile.

  Choose <u>Minimal</u> if users can see only their basic profile information **(their name, email address, job title, hired date, department, and office)**.

  Choose <u>All</u> if users can see all their profile information. This setting also applies to managers viewing their own profile.

- o **Information editable in profile**
  - o Allow employees and managers to edit their own profile. **Note that users can only edit the profile information they are allowed to see. This setting also applies to managers editing their own profile.**

- o **Allow users with no email address**
  - o If you enable this setting, users might not receive some important notifications, including their Welcome Email. Only enable this setting if some of your users do not have an email address.

- o **Allow users with no hired date**
  - o The hired date is used in various features throughout PurelyHR **(e.g. probation periods, prorated balances, length of service accruals).** Only enable this setting if you cannot retrieve the hired date of your employees.

# 🔵 Additional Account Settings Information (Continued)

## Time-Off Module

### General (Account Settings)

- **Calendar Year Settings**
  - The system gives you the ability to set the month at which your calendar year starts. By default, all your users' time-off bank will be automatically renewed upon your calendar year restart. If some of your users require different calendar year settings, you can override the global calendar year setting by editing their user options.
- **User Calendar Year Setting**
  - When manually applying a time-off policy to a user, the system can automatically set their calendar year setting to match their hired date. If not, their default calendar year setting will be set to the global calendar year setting (above).
- **Hours Setting**
  - Select how many hours there is in a full day of work. This value is the number of hours that will be deducted from the employee's time-off bank when they request a full-day leave. Most companies have 8 hours in a day.
- **Balance/Allowance Display Setting**
  - Display the Balance/Allowance in a format of your choice.

    | | | |
    |---|---|---|
    | **Hours** will be displayed as: | 41.25 hr(s) |
    | **Days** will be displayed as: | 5.50 day(s) |
    | **Mixed** will be displayed as: | 5d 3.75h |

### Calendar (Account Settings)

- **Calendar Color Type Setting**
  - Select which type of color coding to use on the calendar. You can colorize the calendar by the colors specified in your User Departments or Time-Off Types.
- **Calendar View Settings**
  - The system has different options on who sees which time-off requests in the calendar. By default, all administrators can see all requests made by any employees or managers. But when employees or managers log in, they can have restrictions on which time-off requests they see on their calendar. These restrictions are only applied to APPROVED time-off requests. PENDING time-off requests can only be viewed on the calendar by administrators or designated managers. The options that have a (*) beside them are what we recommend.

- o **Show Paid Holidays for All Offices**
  - o By enabling this option, paid holidays for ALL User Offices will be displayed in the calendar, regardless of which office is assigned to the user. If users should see only the paid holidays assigned to their office, then set this option to NO.

## Time-Off Requests (Account Settings)

- o **Partial Day Request**
  - o Set whether users can put in put in partial day requests (any time period or half days).
- o **Past Day Requests**
  - o Allow employees to submit time-off requests for days in the past.
- o **Future Calendar Year Requests**
  - o Grant your users the ability to request time-off in the next calendar year. By enabling this option, when a user makes a request in the next calendar year, they will get a notification. Upon approval of these requests, managers will be asked whether the time should be deducted from the current or next calendar year. If the manager chooses the next calendar year, the time will be deducted from the users future balance and not from the current calendar year balance. (Note: depending on your account settings, calendar year may not start January 1$^{st}$ )
- o **User Cancellations**
  - o By default, all approved time-off requests can only be requested to be cancelled. With this option, you can allow your staff to cancel an approved time-off request, as long as it did not occur yet.
- o **Managers to Override Deductions**
  - o By default, whenever a deductible time-off request is made, managers have the choice to deduct hours or not. You can force them to deduct hours by setting the following option to "No". This option is also enforced when managers create time-off requests on behalf of other users.
- o **Time-Off Request Email Notifications**
  - o Set whether managers and admins are cc'd when an action is performed on a time-off request for a user. This includes approving/rejecting/cancelling time-off requests.
  - o Set whether all parties (employee, managers, admins) will receive an email notification when a manager or an admin creates a time-off request on their behalf.
  - o Set whether managers and admins will receive email notifications when time-off requests are cancelled directly by users.
  - o Set whether or not employees, managers and administrators will receive email notifications when a time-off request is created and auto-approved by a user.
- o **Paid Holiday Requests**
  - o Have the system display an alert message that notifies the user when they try to request time-off on a paid holiday, or block them from making a request on that day.

## Time-Off Requests (Account Settings) cont'd

- o **Quick Links in Emails**
    - o When a time-off request is created or requested to be cancelled, an email is sent to the managers. Within the body of this email, you have the option to include quick links in order for the managers to take action on the request.

1. <u>Yes - include a link to an action page, that requires a login</u>
    - o The email will include a Click here to perform an action link, and when clicked, the manager will be redirected to a page that requires a login before an action can be taken on the request.
2. <u>Yes - include Approve | Cancel | Reject links, with confirmation</u>
    - o The email will include Approve | Cancel | Reject links, and when clicked, the manager will be redirected to a page that will require a confirmation of that action.
3. <u>Yes - include Approve | Cancel | Reject links, without confirmation</u>
    - o The email will include Approve | Cancel | Reject links, and when clicked, the action the manager clicked on will be performed immediately, without asking any confirmation.
4. <u>No links</u>
    - o The email will not contain any action links.

## Report (Account Settings)

- o **Hide/Show Columns in Summary Reports**
    - o When employees and managers are viewing their My Summary page and the summary information that is located on the right side of the new request page, or when administrators are viewing summary reports for their users, certain columns are displayed in these screens. You can show/hide the following columns for each user types.
- o **Reporting Restriction for Managers**
    - o By default, managers can only run reports on users they directly manage. You can use the following setting and allow them to run reports on more users.
- o **Enable Month End Summary Report**
    - o The Month End Summary report will give users information on what their starting balance was for a given month, and will also show them a summary of all the time taken, earned, adjusted and cancelled within that month.

## Banked Time (Account Settings)

- o **Banked Time Settings**
  - o The system gives the ability for users to send requests for banked time to be added to their account. Banked time can then be converted into Vacation time, or any other custom time-off types by any Administrator.

    - No  Users cannot submit banked time request
    - Yes - Basic Info - Users can submit banked time requests with basic info
    - Yes - Detailed Info - Users can submit banked time requests with detailed info

- o **Banked Time Default Transfer**
  - o Set the Banked Time to transfer to a specific deductible Time-Off Type. By default, Banked Time will be stored in its own location until an administrator decides what Time-Off type the Banked Time should be placed.

- o **Banked Time Auto-Renewal Settings**
  - o Upon the start of a new calendar year, you have the option to either reset or port over the remaining unused banked time of all your users. Please note the Banked Time Renewal Settings are only applicable if the Banked Time feature is enabled.
    - RESET All unused banked hours will be deleted.
    - PORT OVER – ACTIVE All unused banked hours will be ported over into the new calendar year, and can be transferred into time-off types at a later date.
    - PORT OVER – STORED All unused banked hours will be ported over into the new calendar year but will be assigned to the STORED bank. STORED banked time cannot be transferred into time-off types. The STORED bank is only used for retirement purposes.

# ⚙ Reports

## Time-Off Module

- o **Time-Off Summary** (Available as an Automated Report)

The Time-Off Summary Report gives you detailed information regarding the Users Allowance, Balances, Approved, Pending, Rejected, and Cancelled Requests.  If you allow Carry Over and/or Banked Time, this report will also include information regarding these options. You can also print the Audit Trail from this report.

- **Time-Off Details** (Available as an Automated Report)

The Time-Off Details report gives you information on all time-off requests that were approved, still pending, or declined within a date range.  You can filter these requests by Users and Time-off Types.  You can also use the "Group By" filter to group the time-off requests by Dates, Time-off Types, Users, Departments, Week, or Multi-Day Requests.

- **Time-Off Totals**

The Time-Off Summary report gives you summarized information on all time-off requests that were approved or still pending within a date range.  You can filter these requests by Users and Time-Off Types. You can also use the "Group By" filter to group the time-off requests by Time-Off Types or Users.

- **Type By Months**

The Type By Months Report displays time-off information on all/selected users, by month, for a specific time-off type.  It also displays information regarding each user's remaining balance, adjustments, carry-over and days accrued (if applicable).

- **Pending Requests** (Available as an Automated Report)

The Pending Requests report gives you information on all pending time-off requests that were taken within a date range.  You can filter these requests by Users and TimeOffTypes.  You can also use the "Group By" filter to group the time-off requests by TimeOffTypes or Users.

- **Balance / Allowance**

The Balance / Allowance report gives you information on all time-off types' balance and allowance for each User.  The balance shown can be one of (4) available options:

- Balance (Usable)
  - Displays the current balance an employee is entitled to use on time-off requests
- Balance (To Date)
  - Displays the current balance without removing time-off for their future pending and approved requests
- Balance (To Date) Including New Requests
  - Will subtract hours from approved requests, where the request date is prior to the 'as of' date, but the actual 'creation date' of the request was after the 'as of' date
- Estimated Year-End Balance
  - Displays the projected end of year balance, based on automatic accruals, and all past, current, and future scheduled requests

- o **Allowance Settings**

The Allowance Settings report gives you detailed information on all time-off types and time-off policies assigned to each user, with their settings.

- o **Month End Summary** (Available as an Automated Report)

The Month End Summary report gives you detailed information on all selected time-off types assigned to each user, with a snapshot of what their balance was at the end of that month, and the number of hours/days used in that month.  Click the "Only Show Taken Time-Off" checkbox to only show users that have taken time off during the month.

- o **User Management**

This report displays how User Management is currently setup in your account.

Below are the details on each View:

1. Managers
   - o  Displays all Managers, with the list of Users they are managing.
2. Users
   - o  Displays all Users, with the list of Managers they are managed by.
3. Unmanaged Users
   - o  Displays a list of all Users that currently do not have a Manager.

# ⦾ Simple How To's

## Staff Module

**How to Inactivate/Terminate a user?**

1. Staff Directory
2. Select the user
3. Account
4. Edit
5. Active
6. No
7. Save

This will add the termination date automatically but if needed the date can be modify under the Employment Tab.

**How to send the Welcome email?**

1. Welcome Email
2. Select the User
3. Select Send Welcome Email on the right
4. Confirm by selecting Send

**How to fix errors from the CSV file?**

1. Select View Errors
2. This will show in red all users that have errors
3. With this information go back to the Import/Update Users from CSV page and confirm the possible value.
4. Fix all the errors and upload your file again.

***How to add private Document.**

1. Document
2. Create Folder
3. Admin only or Admins & Managers
4. Enable Permissions to assign the document to specific Departments and/or Offices
5. Create
6. Upload Document

## Time-Off Module

**How to manually modify a balance that's incorrect?**

1. Manage Users
2. User List
3. Edit User Settings
4. Balance
5. Edit

**How to fix a renewal date on a specific user for a time-off type?**

1. Manage Users
2. User List
3. Edit User Settings
4. Allowance
5. Edit
6. Calendar Year Renewal

**How to change the approval path for a user?**

1. Manage Users
2. User List
3. Edit User Settings
4. Approval Path

**How to assign Manager to a user?**

1. Manage Users
2. User List
3. Edit User Settings
4. Management
5. Edit

**How to place on hold an accrual temporally?**

1. Time-Off
2. Manage Users
3. User List
4. Edit User Settings
5. Balance Accrual Tab
6. Edit
7. Set to inactive.
8. Save Changes

## ◉ Upgrade Account

### How to Upgrade to a Paying Account

1. Select "Upgrade to a paid plan" on the top right or the screen
2. Confirm the modules and packages
3. Select Next
4. Review and fill your Company Information
5. If your method of payment is by credit card simply enter your credit card information
6. Select "Upgrade"'

# Need Assistance?

Contact our Customer Success Team

1.844.402.6557

Support@purelyhr.com

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