Create a HR Doc (essential)

1. Log on as admin.
2. Select HR Docs from the black ribbon.
3. Select Manage from the green ribbon.
4. Use the browse button to find the appropriate document and load it up.
5. Fill in name and description of HR Document. (our example: Grievance Procedure)
6. Select to WHOM you wish to publish this essential document, (choice of Office, Department or Employee to select from)
7. In our example we are publishing to the Cork office only.

8. Click submit.
9. As this is an essential document, all employees of the CORK office will be emailed requesting the document be read and signed.
10. You can see it listed in the HR Docs – Essential tab.

Testing Is Our Life

| Essential | Other | Manage | Archived | | ■❯Tutorial |

Essential Documents

| Cork ▾ | - All Departments - ▾ | - All Users - ▾ | - All Documents - ▾ |

| Text to search | | Q Search |

Documents in current filter: 1

Grievance Procedure [Published to: Cork office - All departments - All Users.]
This document details our companies grievance procedure.
Published on: 08/04/2016 ☑Edit ⊘Archive 🗎 Send Reminder

11. If an employee from Cork (for example David Denny) logs on…. They are prompted to sign.

| Dashboard | Time Off | CPD | HR Docs | Directory | | ❓HELP | david denny | Signout |

Testing Is Our Life

Your tasks

You have Documents pending being signed

12. David goes to HR Docs on black ribbon, Essential on Green and see document listed.
    (Please note David is an employee, so has limited options on all ribbons.)

| Dashboard | Time Off | CPD | HR Docs | Directory | | ❓HELP | david denny | Signout |

Testing Is Our Life

| Essential | Other | | ■❯Tutorial |

Essential Documents

| Text to search | Q Search |

Documents in current filter: 4

Grievance Procedure [Published to: Cork office - All departments - All Users.]
This document details our companies grievance procedure.
Published on: 08/04/2016

⚠ **Document needs to be signed**
✎ Sign

13. David signs the document and the HR Document is now listed as signed.

Grievance Procedure [Published to: Cork office - All departments - All Users.]
This document details our companies grievance procedure.
Published on: 08/04/2016

Signed on: 08/04/2016

Create a HR Doc (NOT essential)

1. Log on as admin.
2. Select HR Docs from the black ribbon.
3. Select Manage from the green ribbon.
4. Use the browse button to find the appropriate document and load it up.
5. Fill in name and description of HR Document. (our example: Travel Expense Form)
6. Select to WHOM you wish to publish this document – everyone.

| Dashboard | Time On | Time Off | CPD | Reports | **HR Docs** | Directory | Hire |

Testing Is Our Life

| Essential | Other | **Manage** | Archived |

Publish Document

File

File*	C:\Users\lbyrt\Deskto Browse...
	(10MB max file size)
Name*	Travel Expense Form
Description*	Form to apply for reimbursement of any Travel Expenses
	446 characters remaining.

Publish to

Office	- All Offices -
Department	- All Departments -
User Type	- All Users -
Employee	- All -

Essential

Essential Document	☐

NOTE: To publish documents in Essential Docs tick the box above.
informing them that the document has been published.

7. Document is uploaded and can be seen under HR Docs – Other.
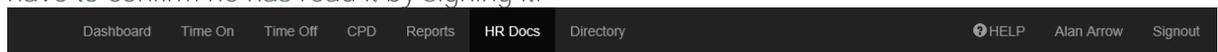
Testing Is Our Life

| Essential | **Other** | Manage | Archived |

Other Documents

- All Offices -   - All Departments -   - All Users -   - My Documents -

Text to search   🔍 Search

Documents in current filter: 5

Travel Expense Form [Published to: All offices - All departments - All Users.]

Form to apply for reimbursement of any Travel Expenses

Published on: 08/04/2016 ☑ Edit ⏱ Archive

NoNon essential trainign b [Published to: All offices - All departments - All Users.]

8. Users are not required to sign NON essential documents.
9. So for example Alan Arrow will see it listed under OTHER for his reference, but he does not have to confirm he has read it by signing it.

| Dashboard | Time On | Time Off | CPD | Reports | **HR Docs** | Directory | | ❓HELP | Alan Arrow | Signout |

Testing Is Our Life

| Essential | **Other** | Manage | Archived | | ▪Tutorial |

Other Documents

- All Offices -   - All Departments -   - All Users -   - My Documents -

Text to search   🔍 Search

Documents in current filter: 6

Travel Expense Form [Published to: All offices - All departments - All Users.]

Form to apply for reimbursement of any Travel Expenses

Published on: 08/04/2016