Getting Started

Thank you for choosing CompanyControls.pro

CompanyControls is proud to work with other companies who may make CompanyControls available to you under a different name and different URL. Any URLS found in this guide or elsewhere can be replace:

https://companycontrols.pro/cc/emample.aspx > https://other.com/cc/emample.aspx

CompanyControls has been designed to be simple and quick to use but versatile enough to accommodate your business. Its versatility gives you complete control over its implementation and a tight fit to your business.

What follows is a step by step guide to starting and using all aspects of EW Assist.

Basic setup

Creating your account

Your account will be created on your behalf

Start date

It is essential that every employee has a start date set to correctly calculate some privileges.

When you first registered your account you will not have added an employment start date for yourself. Do this @ People > your name > Person (dropdown) > Work > Employment start

Licences & functionality

The account will initially contain 3 free licences, one of which is used for the employee who registered the account.

Additional licenses can be added @ Admin > Licences.

Some modules have more than one business area in them and these can be switched on and off as required. For instance Absence Management Module incorporates Leave, Sickness and Injury and each can be turned on and off at Admin > System Functionality (dropdown) > System Functionality.

Once the System Functionality has been selected the corresponding functionality roles should be added to the only registered user. Do this @ People > *Persons name*

> Person > Functionality roles and select each role and click [add]. Functionality roles control the administrative access for that particular business area.

Countries

On registration, your main locations' country will be added to your account. If you have other locations in different countries these will need to be added.

Additional Countries can be added @ Admin > Settings > Lookup Tables > Country Codes

Tick the countries that you have offices in

Note: If your country is not listed let us know and we will add it

Calendars

Multiple calendars can be added to suit all your employees' locations and countries. Each Calendar holds the standard holidays for the chosen country for the next few years, however you can edit these holidays and add others if necessary.

By Default a calendar is included for the United Kingdom (England and Wales). To activate this calendar go to Admin > Settings > Calendar sets > Default Working Year and click apply to add the years. NOTE: this calendar starts in April; create a new one if you want it to start in January. This calendar doesn't control when the leave year starts.

Additional Calendars can be added for other Countries @ Admin > Settings > Calendar sets > Add

Work Patterns

A work pattern defines when an employee is working.

By default a Work Pattern is included for Monday to Friday 9am – 5.30pm with a break between 12.30 and 1.30.

Additional Work Patterns can be added to suit all your employees' @ Admin > Settings > Work Patterns > Add

Groups

Groups should include all your departments within your organisation. Each employee is given a 'home group' which defines who will be their manager. For this reason the manager of an employee

By Default a Group is included called Company.

Additional Groups can be added @ Groups > Add

Areas

Areas should include all your geographic locations.

By default an Area is included called Global

Additional Areas can be added @ Area > Add

Delay welcome emails

RECOMMENDED: To delay the sending of the welcome email to each employee until setup is complete and tested go to Admin > Settings > Delayed Emails

Module setup

Leave

Absence Types

Annual and compassionate Leave are the most common types of absence requested by an employee. Other absence types are available, however initially they are switched off and would need to be turned on before an employee can request that type of absence.

Edit your Absence types @ Admin > Holiday/Leave > Absence Types

Absence Rules

Absence rules are built to assist the manager in approving leave requests. They automatically check every request against an unlimited number of rules that you specify. This might include ensuring department levels never drop below a critical number or that key personnel are never away at the same time. Most rules should be added to warn the manager of the rule conflict unless it is absolutely critical, in which case the rule should be mandatory with no override.

Edit your Absence rules @ Admin > Holiday/Leave > Absence Rules

Annual Increments

These increments automatically adjust your employees entitlement depending on the employees length of service. The appropriate proportion of the adjustment is applied at the beginning of your annual leave period and the remainder on your employees start date anniversary.

Edit your Annual Increments (service days) @ Admin > Holiday/Leave > Annual Increments

Mandatory Leave

This is leave that is enforced by company annual leave policy to cover any mandatory shutdown or closure of your organisation. The Mandatory leave is applied to all your employees who follow the specified mandatory leave calendar.

Add your Mandatory Leave @ Admin > Settings > Calendar sets > Add

Sickness

Finer control can be applied to the sickness features @ Admin > System Functionality > Sickness > Core. Sickness alerts can be setup @ Admin > System Functionality > Sickness > Alerts.

Core defaults

Defaults can be created to speed up the adding of new employees @ Admin > Settings > Core defaults. Simply select the options that suit most of employees. These can be changed at any time to suit the employees you are currently adding. You may also need to update the Core Defaults if you have added a new Calendar and/or a new work pattern. This just means that if you add a new employee in the future, they will be given this calendar or work pattern by default.

This is particularly useful when you are using the bulk employee upload feature described below.

Edit the registrant

Update the first person to be added to your account with the information that has just been added such as work patterns, calendars etc

People

Now it's time to add your employees. If you do not want these employees to receive their welcome email straight away then go to Admin > Settings > Delayed Emails as described above.

Bulk Upload

1. Groups of employees can be added in bulk
2. Download the Microsoft Excel file to your computer @ Admin > Files > 'User Bulk Upload Template'
3. Add your employees to the 'User Bulk Upload Template' as described in the file
4. Upload the 'User Bulk Upload Template'' @ Admin > Files > 'Bulk User Upload'

NOTE: It is important to remember that employees uploaded via the above process will take on the core defaults so it is recommended that groups of employees with the same settings such as work patterns and calendars are uploaded together and the core defaults are changed to suit the next batch of employees to be uploaded. If all but a few have the same settings it would be easier them all and to edit the few with different details individually by going to People > *Persons name* > Person (dropdown) > Work.

Individually

1. New employees can be added @ People > Add
2. Initially new employee will be given the core defaults. You can edit an employee's information @ People > *employee name* > Person (dropdown) > Work

Managers

The groups that were added previously need to have a manager assigned to them. All employees that belong to that group will be managed by this employee.

Assign a manager for each group @ Groups > Group link > Detail (dropdown) > Edit

Send welcome emails **(Once sent, your employees can start to login)**

If welcome emails had been delayed they will need to be released.

Future welcome emails can be turned on @ Admin > Settings > Emails > Delayed emails. Tick 'Send email to joining user' and [Submit]

Release the held emails by ticking 'Take this action' in Send all delayed emails from the Email Queue section and [Submit]

Non essential areas to consider

Site Roles

Employee's can have broad access levels as well as those provided by Functionality Roles. These are Client Admin, manager and User. The person who registered the account is automatically set as Client Admin and has access to everyone and everything including the administration area. A User who is also a Manager of a group has increased permissions to manage and view the group's members. A Manager site role however gives global access to all areas and all employees but not the Admin area. Site roles can be adjusted @ People > employees name > Person (dropdown) > Work.

Company Locations

Add locations @ Admin > Locations/Contacts > Work/Sites/Offices

Add these locations to employees @ People > employees name > Person > Work

Company Roles

Company roles can help promote the various unstructured roles that are taken on in the work place such as health and safety officer, lottery syndicate manager, first aider etc. These company roles can be searched in the directory and created @ Admin > Lookup tables > User > Company Roles. They can be given to an employee @ People > Employee name > person (dropdown) > Company Roles.

Jobs

Job titles can be added @ Admin > Settings > Lookup tables > Users > Jobs. Jobs can be given to your employees either as their main job title @ People > Employee name > Person > Work or within their group @ Group > Group name > Members > Role in group link. Update the job in group and [submit].

Company Information – contacts

Company Contacts can be search and added (with the Company Information Functionality role) to Directory > Companies > Add. Additional controls can be found @ Admin > Settings > Lookup tables > Users > Company Information. The Company Information module supports other modules by providing address/employee information of your company's contacts to those modules. It can also be used to hold a companywide directory list of all your contacts.

Personnel private information (HR Lite)

Personnel information such as Home address and Next of Kin can be maintained either by a central administrator or the employee themselves @ People > Employee name > Person (dropdown) > Home/Next of Kin/Bank/Work permit or My details > My details (dropdown) > Home/Next Of Kin/Bank/Work permit. A report is available to show what changes have been made to keep other systems up to date.

Import historical records

Historical leave and sickness records can be imported by downloading the Absence Bulk Upload Template @ Admin > Files. Complete this spreadsheet and Upload it @ Admin > Files > Bulk Absence Upload. We recommend uploading at least the last 12 months of sickness records and Leave to the beginning of the current leave year.

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Customer Support

Raise a support ticket at here

Email your support request to here

Call 0844 736 1820 ext 2 (available between 9.00 and 17.00 GMT)

Other lines of support

Forum - http://support.CompanyControls.net/forum
Blog - http://blog.CompanyControls.net/
Resources - http://blog.CompanyControls.net/page/Resources.aspx
How to videos - http://www.CompanyControls.net/how-to.aspx