



 CompanyControls

User Guide

On demand business automation

 CompanyControls

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Introduction

Thank you for choosing CompanyControls.

CompanyControls is an integrated suite of on-demand software modules, each of which targets a distinct business process to improve efficiency, accuracy, compliance & communication throughout your organisation.

Each module is available separately as a powerful standalone system or alternatively, multiple modules that inter-connect and work together to promote successful business automation.

CompanyControls has been designed to be simple and quick to setup but able to accommodate all business models. Its versatility gives you complete control over its implementation and a tight fit to your organisational needs.

Purpose

This guide is intended for all users of CompanyControls.

Scope

This guide will cover all requirements of use and configuration of CompanyControls.

Convention Key

This guide uses the follow conventions to describe particular parts of CompanyControls.

<u>Underline</u>	➡	Hyperlink (e.g. <u>Create Leave Request</u>)
<i>Italic</i>	➡	Section title (e.g. <i>My Current Leave Requests</i>)
'Single quotes'	➡	Field (e.g. 'Forename')
[Square brackets]	➡	Button (e.g. [Submit])
Bold	➡	Menu route with > between selections (e.g. My details > Groups)
https://companycontrols.pro	➡	Web address

Describing CompanyControls

CompanyControls is focused on providing perfect business automation across your organisation.

Business automation is achieved by giving controlled access to your employees to help streamline and communicate the numerous procedures that take place to both support and run a healthy and prosperous organisation.

Each business procedure is available as a standalone module with in CompanyControls that can be adopted and laid across your organisation to help promote better teamwork, reduce errors and improve communications in that particular area.

Additional modules can be switch on at any time to add greater and more practical support to your business. The related information in all adopted modules will automatically be shared across other modules and work together to provide enhanced data capture and further reduce both double entry and inaccuracies.

Setting Up the system for the first time

Follow the instructions in the Getting Started Guide. We strongly recommend the guidance is followed closely to ensure a straightforward setup. The following points are covered in more detail.

1. Create your account by going to http://ewassist.co.uk/client_new and following the instructions
2. Once setup, login and update the registered users employment start date (**People > user name > edit**)
3. Add Licences (**Admin > Licences**)
4. Edit the system functionality (**Admin > System Functionality (dropdown) > Set functionality required**)
5. Add Countries (**Admin > Settings > Lookup tables (dropdown) > General > Country codes**) and Time zones (**Admin > Settings > Lookup tables (dropdown) > General > Time Zones**)
6. Setup the Calendars for the countries you operate in (**Admin > Settings > Calendar Sets > Add**)
7. Setup the Work Patterns that your employees follow (**Admin > Settings > Work Patterns > Add**)
8. Add your Groups (**Groups > Add**)
9. Add your Areas (**Areas > Add**)
10. Check Welcome emails are delayed (**Admin > Settings > Email (dropdown) > Delayed emails**)
11. Edit the Absence types available to your employees to request leave against (**Admin > System Functionality > Leave > Absence Types**)*
12. Edit the Absence Rules to suit your company policies (**Admin > System Functionality > Leave > Absence Rules**)*
13. Edit the Annual Increments to suit your company's Annual Service Award Scheme (**Admin > System Functionality > Leave > Annual Increments**)*
14. Setup any Mandatory Leave (**Admin > Settings > Calendar Sets > Add**)*
15. Edit Sickness settings (**Admin > System Functionality > Sickness**)*
16. Edit the Core defaults to suit the majority of your employees (**Admin > Settings > Core Defaults**)
17. Edit the registrant (**People > Persons name > Person (dropdown) > Work**)
18. Add Employees individually (**People > Add**)
19. Add Employees in Bulk (**Admin > Files > Bulk User Template/Upload**)
20. Assign a Manager to each Group (**Group > Group link > Edit**)
21. Send Welcome emails to employees (**Admin > Settings > Email (dropdown) > Delayed emails**)

* Optional

Suggestion

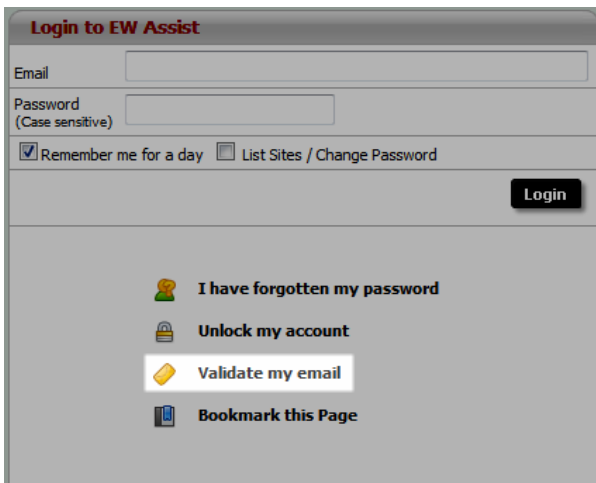
When using the bulk upload feature it is recommended that you upload Employees that match the Core Default settings as these settings will be applied during the upload, (although an employee can be edited after they have been added). Once one group of employees have been uploaded, go to Core Defaults and change the settings (Calendars, Work Patterns etc) to suit the next batch of Employees. The name of the Bulk Upload Template file can be changed to remind you of the employees that the file contains.

First-time Users

Logging in

Every User of CompanyControls will receive an email to confirm their email address which will contain a link to activate their access to your account. Once their account access has been confirmed another email will be sent to them with a temporary password which will have to be changed to their preferred password prior to accessing the system. Passwords are required to be strong; they must be at least 8 characters long and include at least one capital letter and one number.

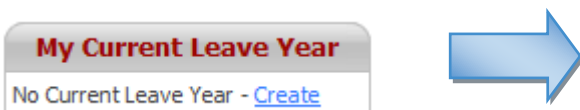
The initial email confirmation request will be automatically cancelled if not used within 28 days of it being sent. Without confirming a user's email address they will not have access to your account. Another email validation can be sent from the login page.



The login page is located at [HTTP://EWASSIST.CO.UK/LOGIN](http://EWASSIST.CO.UK/LOGIN)

Creating the Leave Cycle (Annual Entitlement)

Once logged in, the user can initiate their leave cycle by either requesting leave or by clicking the Create link in *My Current Leave Year* at the top of the users Dashboard.



List of Leave Cycles	
Total Records: 1	
Cycle Starts Wed 01 Apr 2009 : Ends Wed 31 Mar 2010	
Is Current	Yes
Based on Working Day of	07:30hr
Annual Leave	
Carry Over Days	0.00d
Base Days	25.00d
Adjustment Days	0.00d
Total Days	25.00d
Unused Days	22.00d
Approved Days	3.00d
Taken Days	0.00d
Absence Requests	

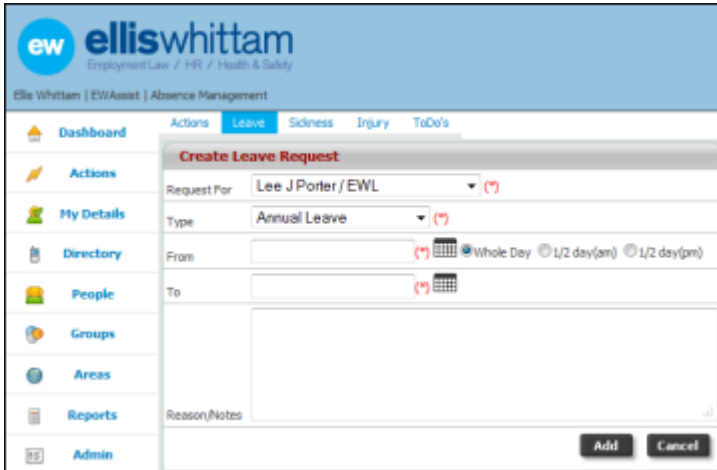
On Creation, the Leave Cycle will include any Mandatory Leave, Carry Over Entitlement and Annual Service Award days.

Instructions for Annual Leave

Requesting Absence

Dashboard > [Request Leave] OR

Actions > Leave > Create Leave Request



Complete the form and click [Add]. This will create a **draft** leave request that will need to be submitted for approval to your Home Group Manager.

ABSENCE RULES

As the leave request is first added it will be compared against any leave rules that apply at that point in time. If the request conflicts with any of the rules it will show **fail** against the corresponding leave rule otherwise **Pass** will be shown.

Absence rules can be added and edited @ **Admin > System Functionality > Leave > Absence Rules**.

A summary of the status of all rules are summarised and shown on the leave request with a breakdown of each rule at the bottom of the page.

Submitted	17/11/09 10:22
Mandatory Rules Status	Pass
Warning Rules Status	Pass
Could be Approved	Yes
Applied	

CHANGING THE DAYS AND HOURS

The period of time that the leave request refers can be changed prior to submitting it for approval in two ways. Either selecting Change next to the Duration of the request or by clicking [Change Days] below the *Leave Request Days* breakdown.

One period of a day (e.g. the morning) or a whole day can be removed by changing the Start and End times to 00:00 and click [Submit]. The duration is recalculated to reflect the changes.

Leave Request Days (10)									
Date	Period 1 Start	Period 1 End	Period 2 Start	Period 2 End	Line Hours	Days	Comment	Type	
Tue 31 Jul 2012	09:00	12:45	13:45	17:30	07:30	1.00		Working	
Wed 01 Aug 2012	09:00	12:45	13:45	17:30	07:30	1.00		Working	
Thu 02 Aug 2012	09:00	12:45	13:45	17:30	07:30	1.00		Working	
Fri 03 Aug 2012	09:00	12:45	13:45	17:30	07:30	1.00		Working	
Sat 04 Aug 2012	00:00	00:00	00:00	00:00	00:00	0.00		Day Off	
Sun 05 Aug 2012	00:00	00:00	00:00	00:00	00:00	0.00		Day Off	
Mon 06 Aug 2012	09:00	12:45	13:45	17:30	07:30	1.00		Working	
Tue 07 Aug 2012	09:00	12:45	13:45	17:30	07:30	1.00		Working	
Wed 08 Aug 2012	09:00	12:45	13:45	17:30	07:30	1.00		Working	
Thu 09 Aug 2012	09:00	12:45	13:45	17:30	07:30	1.00		Working	

Change days

SENDING FOR APPROVAL

Once the details of the request have been reviewed, the request can be sent to the manager by changing the status to Send for Approval. By selecting Withdraw cancels the request. An email will be sent to the Manager, notifying them of the leave request waiting for a decision.

Once the leave request has been made it can be found in *My Current Leave Requests* on the Dashboard and in **My details > Leave > Requests > Current** (in all statuses including draft). The detail of the leave request can be accessed by clicking on the corresponding Absence Ref.

CANCELLING LEAVE

A Leave request can be cancelled at any time during the approval process by navigating to the specific request and selecting Withdrawn and clicking [Submit]. An email will be sent to the Manager informing them so long as it has been sent for approval.

Create Leave Request	
Absence Request Ref	000150
For	Lee J Porter
Work Pattern	Company Standard
Type	Annual Leave
Reason/Notes	
From	Mon 14 Jun 2010
To	Fri 25 Jun 2010
Duration	10.00d Change
Working Day of	07:30hr
Flexitime	No
Current Status	Draft
Change to	<div style="border: 1px solid black; padding: 2px;"> Draft <ul style="list-style-type: none"> <li style="background-color: #e0e0e0;">Draft <li style="background-color: #0070c0; color: white;">Send for approval Withdraw </div>
Submitted	
Mandatory Rules Status	
Warning Rules Status	Pass
Could be Approved	Yes
Applied	
Mandatory was Overridden	No
Removed	
Updated :	08/12/09 14:31 LJP
Added :	08/12/09 14:31 LJP
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Approval of Absence

The Manager of the Home Group for the employee requesting leave will receive notification of the pending leave request by email. The email has a quick link to go straight to the requested leave.

The leave approval page is similar to the requesting leave page. The manager can see the details of the request including whether it has conflicted against any Absence Rules. In addition the page has an *Approval Decision*.

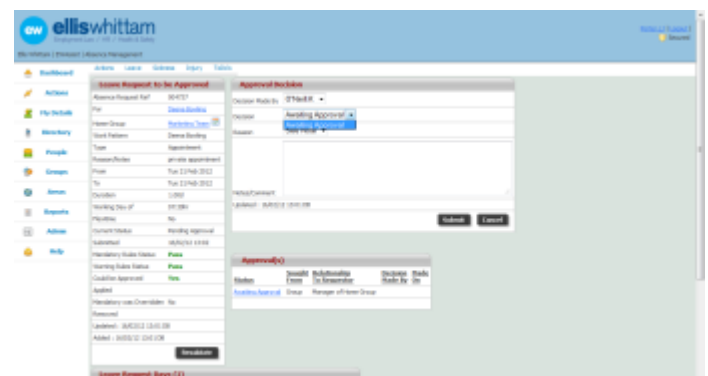
Suggestion

Absence Rules should be used to alert the manager of any situation that they would be mindful of, such as key personnel being away at the same time or department levels falling below a critical threshold (see Absence rules for more information).

The Manager can see the leave that falls at the same time as the requested leave in the same group by clicking the calendar icon next to the Home Group.

APPROVING LEAVE

The Manager can Approve, Reject or put the request on hold all with notes to support the decision. In each case an email is sent to the requester with the decision and a link to the request.



Leave Cycle Management (incl. Entitlement)

The leave cycle manages the entitlement and the period in which it is valid. The Base Leave entitlement for an employee is configured in **People > employee name > Person > Work** under *Edit Employee*. This amount renews for each consecutive Leave period. The leave period is also set in **People > employee name > Person > Work** at 'Leave starts on'. The leave period can have the following configurations for each employee:

Leave period

Company Cycle – Yearly

Personal Cycle from date entered

Personal Cycle from Start date

Personal Cycle from month of start date (1st)

Personal Cycle from Month after start date (1st)

Personal Cycle from 3 months on from start date (1st)

When adding an employee the leave cycle configuration is taken from **Admin > Settings > Core Defaults**.

The following adjustments can be made to an employee's leave cycle:

CARRY OVER ENTITLEMENT

Carry over can be managed by selecting a maximum number of entitlement days allowed to automatically carry over to the next leave period in **Admin > Settings > Core Defaults** at 'Max Carry Fwd Leave'. If the employee has fewer days than the maximum allowed, then this amount is carried over instead.

Furthermore an absence rule is available at **Admin > Leave > System Functionality > Absence Rules (FT Carry Over must be used within N Days of Cycle Start)** to ensure that carried over entitlement is used within a set time (e.g. 90 days after the start of the leave cycle).

MANDATORY LEAVE

Mandatory Leave is applied to the Leave cycle depending on the setting 'Mandatory Holidays' in **People > Employee name > Person > Work**.

The application of the Mandatory leave can be applied automatically when the leave cycle is first created or manually by going to **Admin > System Functionality > Leave > Leave Cycles > Bulk Process Adjustments**. To ensure Mandatory Leave is applied automatically go to **Admin > System Functionality > Leave > Absence Rules** and ensure the rule 'Mandatory Leave auto applied' is set to be used.

Mandatory Leave can be edited in **Admin > Settings > Calendar sets** and added by going to **Admin > Settings > Calendar sets > Add**. An existing Mandatory Leave Calendar set is already preconfigured called 'Default MH' but does not contain any Mandatory leave dates. To add dates go to 'Default MH' and click on the Period Name for the year the new Mandatory Leave dates fall in.

Four years are automatically added when adding a new Calendar set. To add additional years on the end of the calendar years already available, change 'Num Periods' from 4 to 5 and click [Submit]. In the same way any number of additional years can be added and the Mandatory dates that fall in each year should also be added.

The 'start from' of the Calendar set ensures a preferred yearly cycle is used which benefits the administrator adding the mandatory Leave. The Working days are taken when adding a new Calendar set to give you more information when applying the Mandatory Leave dates. The Mandatory Leave added to the Calendar effects each employee depending on his or her own Work Pattern.

Should an employees Calendar or work pattern be changed, the system will automatically check all future mandatory leave requests and add or remove them as required.

ANNUAL SERVICE AWARD MANAGEMENT

Annual Service award will be automatically applied to the Leave cycle depending on the setting 'Annual Increments' in **People > Employee name > Person > Work**.

The annual service award is given to employees depending on their length of service and adds extra days to their entitlement.

The annual service award is applied in two parts for any particular year the award applies to. Firstly a proportion is applied at the beginning of the leave cycle (determined by the setting in **People > employee name > Person > Work > 'Leave starts from'**) and then another proportion is applied on the anniversary of the employees start date. In total this makes up the total value of the extra part of entitlement to add.

Alternatively the annual service award can be added in one lump sum at the beginning of the next full leave year. To choose this option set **Admin > Settings > Core defaults > 'Leave Annual Increment Non Proportional'** to true (ticked).

The Annual Service Award is managed by going to **Admin > Holiday/Leave > Annual Increments**. An Annual Service Award is already preconfigured called 'Company Standard'. This Annual Service award can be edited by clicking on Company Standard. The *Annual Increment set* is shown which allows for each service year to be configured for the correct amount of additional days to be added to the entitlement up to 50 years. The first year ('In Year 0') refers to the employees first year employment, so any additional days added here would be immediately added to the employees entitlement on their first days at work.

MANUAL ENTITLEMENT ADJUSTMENTS

A manual adjustment to an employee's entitlement can be made by going to **People > employee name > Leave > Leave Years**. From there select the 'Year start' date for the leave year the adjustment falls in. This then shows the current adjustments already added for that leave year and use either of the two forms to manually add an adjustment.

Add/Edit Leave Year Adjustment (bottom left) should be used to add a change such as 2 days or -3.5 hours. *MAKE TOTAL Leave Year Adjustment TO BE* (bottom right) can be used to set the total, in days or hours, to be something else, such as 15 days or 200 hours. The latter is useful when rounding up the available entitlement for a new starter.

An adjustment might need to be added if for example, a bank holiday was worked over or an employee was sick during leave or as an additional reward.

Applying Leave Rules

Leave rules are powerful conditions that can be set to pre-manage the leave requests prior to them being displayed to the manager. Leave Rules look for situations that the manager would be routinely mindful of and mark the conflict against the rule and summarise against the request itself. This is visible to both the employee requesting the leave and the manager looking to authorise it. An Absence rule can be set to the following strengths:

Rule strength	Chance of approval
Mandatory	Cannot be approved by anyone (black fail)
Admin Confirm Override	Can be approved by an Admin (Client Admin or Leave Admin) (red fail)
Mandatory with override	Can be approved by the Manager in exceptional circumstances (orange fail)
Warning	Can be approved by the Manager (yellow fail)

CompanyControls is pre configured with the available rules at **Admin > Holiday/Leave > Absence Rules**.

Some of the rules can be duplicated to allow for managing multiple Groups, Areas or Users by clicking Copy.

All rules can be edited by clicking the Absence Rule title. Each rule has standard settings such as strength and whether it applies to full and/or part-time employees. The specific rule control is towards the bottom of the screen and includes either a number or two date boxes, which setup the limits of the rule. At the bottom of the page are selections for who the rule applies to (i.e. which group, area or employee) and which employees are excluded from the rule.

Suggestion

By using the employee exclusion option, a rule can be set to restrict one employee or group but exclude a particular employee.

For instance, a rule can be set to restrict a department to 5 away at any time but not to include the senior manager. If the senior manager is away however the 6th employee will conflict the rule. Similarly, if a rule is set to restrict the MD and their assistant but excludes the MD then the assistant will not be able to take leave when the MD is away but if the MD books leave when the assistant is away the exclusion will apply.

The rules available include the following:

Rule	Notes	Recommend Strength
Requested dates are not within an existing approved request	Leave requests will not overlap	M
Enough entitlement left for request	Entitlement overspend	M
Max days duration of leave request	2 weeks max leave	A with O

Min days notice required	2 weeks notice	M with O
Max days requested within a 30 days margin	Total leave in any 61-75 day period	M with O
Max number of Company employees away together	*Max off work	A with O
Max number of Group employees away together	*Max off work	M with O
Max number of Area employees away together	*Max off work	W
Employees not to be away at the same time		W
Company restriction on leave between these dates	No leave between 2 dates	W
Group restriction on leave between these dates	No leave between 2 dates	W
Area restriction on leave between these dates	No leave between 2 dates	W
Employees restricted from leave between these dates	No leave between 2 dates	W
Min Company staffing level	*Min at work	A with O
Min Group staffing level	*Min at work	M with O
Min Area staffing level	*Min at work	W
Carry Over must be used within N Days of Cycle Start		W
Mandatory Leave auto applied		W
Max Compassionate days per Cycle		W
FT Carry Over must be used within N Days of Cycle Start		W
Max days in one Flexitime request	Future compatibility	W
Max Birthday days per Cycle		W
Max Duvet days per Cycle		W

M=Mandatory

A with O = Admin Confirm Override

M with O= Mandatory with Manager Override

W=Warning

Absence Type Selection

When the account is first setup the Absence types that are available for your employees to request leave for are Annual Leave and Compassionate Leave. Other Absence types are available. To manage which Absence Types are available to your employees go to **Admin > Holiday/Leave > Absence Types** and click on the Type. In the *Edit Absence Type* section check/uncheck the 'Enable' box and [Submit].

Availability Limited tickbox restricts the use of this Absence Type to employees with a Functionality Role of 'Absence – Select Restricted Types'

The colour fields can be used to set the colour shown for that type of leave (while pending or approved) on the **My Team Calendar** report. Standard colour names can be used e.g. red or hex-codes such as #008080 (https://www.w3schools.com/colors/colors_picker.asp)

Add Next Cycle to all employees (forced)

Normally the next Leave Cycle for each employee is not added until the employee requests leave that falls within it. If it is necessary to add the next cycle before this event go to **Admin > Holiday/Leave > Leave Cycles > Bulk Add Next Cycle**. This can be useful for Administration or reporting purposes.

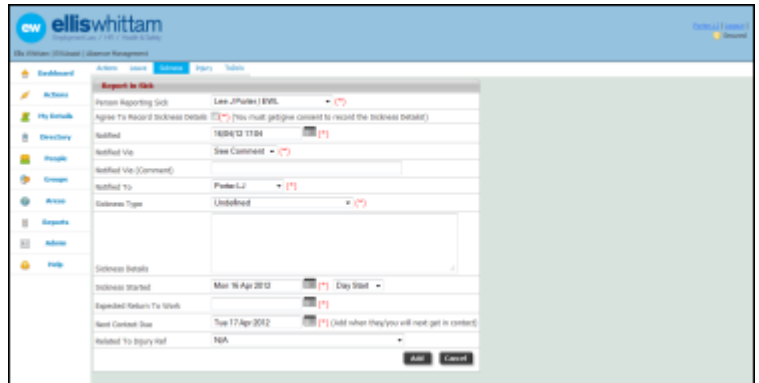
Process All Adjustments (forced)

This will calculate all adjustments such as annual increments, carry forward all untaken leave from the previous leave cycle (based on settings in **Admin > Settings > Core Defaults**) and deduct all mandatory leave from cycles based on today's date.

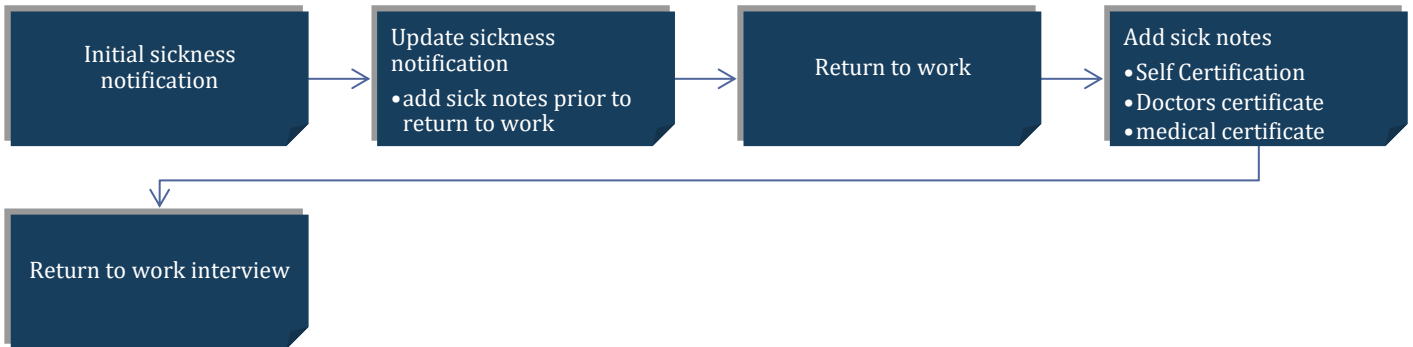
Instructions for Sickness Absence

Recording Sickness

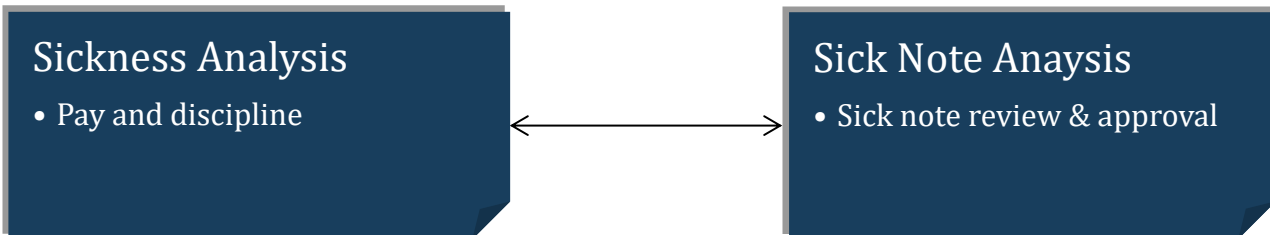
Any employee can record sickness for another employee by going to **Actions > Sickness > Report in Sick**. Complete the form with as much information as possible and [Add] it to the sickness register. At this point the record is only available to Administrators, the sick employee’s home group manager and the sick employee themselves to update as necessary.



The standard path of the sickness follows this route:



In addition to the standard path, the sickness can be analysed in more detail by turning on ‘Sickness - Require Review’ in **Admin > Settings > Core defaults**.



Updating a sickness record

The sickness record can be updated if the details of the sickness absence change while the employee is still absent. Details such as expected return date, next contact date and the specific reasons for the absence can be updated.

Notice of Return to work

CompanyControls should be notified once the employee has returned to work. This closes the sickness status against the employee and expects information required to finish the sickness record such as sick notes and interviews.

Sick Note collection

A sick note can be added at any time during or after the sickness period. The sick note can be in the form of a self certification, a doctor’s note or a medical certificate. A sick note will be expected to cover all working days of the sickness period before the sick note request is closed.

Return to Work Interviews

A return to work interview can be between the Manager and the Employee or just between the management. In either case CompanyControls return to work interview provides a simple questionnaire to improve the employee’s absence rate by examining any problems that is causing the absence in the first place and the solutions that can be implemented to remove these problems. The management review examines whether the changes implemented from the interview have been successful and if the sickness absence for the employee has improved.

Interviews can be closed as not required.

Sickness Analysis

The sickness analysis allows the manager/administrator only to examine the details of the sickness and make management decisions such as disciplines, frequency/pattern alerts and pay, based on the previous sickness, absence rates and the [Bradford factor](#).

CompanyControls utilises the ‘Milton mitigation’ which follows the Bradford factor calculation very closely except makes fair adjustments for part time workers so that their rates (and impact on business effectiveness) are comparable to full time workers.

In order to access the Sickness Analysis, click on the [Sickness Ref](#) link.

Sickness Ref	Sick Notes	
001022	001	H
001015	001	J
001016	000	J
001007	002	L

Sick Note Analysis

The Sick Note analysis allows the manager the opportunity to confirm the completion of the sick note and whether it was done to their satisfaction.

In order to access the Sick Note Analysis click on the [Sick Notes](#) link.

Sickness Ref	Sick Notes	
001022	001	H
001015	001	J
001016	000	J
001007	002	L

Progress Notes

Progress notes can be kept against any of the management sickness records.

General Instructions

Adding Countries

When you first registered CompanyControls you would have chosen your first country location. This will already be selected. If you need to add additional locations for other countries you have offices in, then select them by going to **Admin > Settings > Lookup tables > Country Codes**.

Adding Time Zones

When your first country was chosen during registration, its corresponding time zone will also have been selected. If additional countries are required and they operate in different time zones than your main location, their time zones should also be selected by going to **Admin > Settings > Lookup tables > Time Zones**.

Adding Calendars

Calendars specify which days are non work days such as bank and standard holidays (when the Calendar 'Type' is set to 'Working year'). A Calendar should be added to suit each of your employees. These can be added by going to **Admin > Settings > Calendar Sets > Add** and selecting the appropriate 'Country'. See *Adding Countries*.

A Calendar is already included called Default Working Year which can be edited to suit.

CompanyControls already includes the default standard holidays the selected country for at least the next 3 years and they will be added along with the calendar. The included standard holidays can be edited and additional days not already included can be added to suit your needs by clicking Period Name.

List of Calendar Set Periods												
Total Records: 5												
Period Name	From	To	Days All	Days Work	Days WEnd	Days M&PH	Days Other	Days Ovr	Added	By	Updated	By
2009.04.01 - 2010.03.31	01/04/09	31/03/10	365	253	104	8	0	0	20/10/09 11:52	SYS	20/10/09 11:52	SYS
2010.04.01 - 2011.03.31	01/04/10	31/03/11	365	253	104	8	0	0	20/10/09 11:52	SYS	20/10/09 11:52	SYS
2011.04.01 - 2012.03.31	01/04/11	31/03/12	366	254	105	7	0	0	20/10/09 11:52	SYS	20/10/09 11:52	SYS
2012.04.01 - 2013.03.31	01/04/12	31/03/13	365	260	105	0	0	0	20/10/09 11:52	SYS	20/10/09 11:52	SYS
2013.04.01 - 2014.03.31	01/04/13	31/03/14	365	261	104	0	0	0	22/10/09 23:10	LJP	22/10/09 23:10	LJP

The newly create Calendar set will include four years by default, however this can be adjusted by changing the 'Num Periods'. Any years without standard holidays available to be added automatically will show in **Admin > Settings > Calendar sets > Default Working Year** under *List of Calendar set periods* in 'Days M&PH' (Days Mandatory and Public Holidays) as zero.

Information

When adding a new Calendar set, the 'Start From' and work days are for your information only.

Adding a Group

A new group can be added at **Group > Add**. Complete the information and click [Add].

The 'Manager' of the group will be responsible for approving leave requests and carrying out sickness absence tasks.

Adding an Area

A new Area can be added at **Area > Add**. Complete the information and click [Add].

Adjusting the Core defaults

Core defaults are the settings the system looks to, to make default configurations that have not been specified. An example of this is when adding people in bulk.

Core defaults are available at **Admin > Settings > Core defaults**.

Warning

The *Reset Core defaults* section will return the account to the default settings and should be used with care.

Adding People

ADDING ONE PERSON

To add a new person to the system, go to **People > Add**. Complete and click [Add].

The email address should be real if the user is required to access CompanyControls. Only until they have validated their email address will the system allow them to login to the account.

The Home group will determine who approves their leave requests and carries out sickness absence tasks.

'Site Role' will determine the level of access the user has to your account.

It is essential that the correct 'Employment Start' date is added as this will allow CompanyControls to calculate the appropriate leave entitlement taking in to consideration any automatic adjustments.

The 'Working Day' allows for different lengths of working day to be considered as 1 full day against leave entitlement. For instance, the following are the same:

	Working Day	Work Pattern	Entitlement
Employee 1	7 ½ hrs	9 – 12:45	10
Employee 2	3 ¾ hrs	9 – 12:45	20

When employee 1 requests leave, CompanyControls will calculate the leave entitlement used as ½ a day and they have an entitlement of 10 days – giving the 20 half days to use, whereas for Employee 2 the entitlement used would be 1 day and they have 20 days entitlement.

ADDING A GROUP OF PEOPLE

A group of employees can be added together. The process can be broken into 4 sections:

1. Download bulk template file (spreadsheet xls)
2. Enter the employee information onto the file
3. Upload the file
4. Process the file

Download bulk template file

Go to **Admin > Files** and select Bulk Users Template ('File Title'). Under *File Versions/Sub Doc* select Download File and save the file to your PC.

Enter the employee information

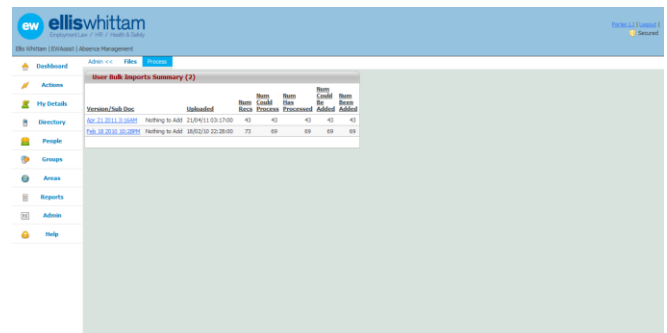
Locate and open the Bulk User template file on your PC and enter the information about your employees. Once your employees have been added, remove the help information below the ===== line, leaving your employee information. Save the file.

Suggestion

If groups of your employees have different work patterns, use different Calendars, follow different Mandatory leave etc it is suggested to group the different types of employees on to different Bulk User Template files and rename the file to explain the employees it contains.

Upload the file

Go to **Admin > Files** and select Bulk User Upload ('File Type'). Under *Edit File Header* select Upload New File. Browse to the saves Bulk User Files and select it. Use 'Version/Sub Doc' to explain the types of employees that the file contains. If you do not complete 'Version/Sub Doc' the upload date/time will be used. Click [Add].



Version/Sub Doc	Uploaded	Num Recs	Num Found	Num Imported	Num Deleted	Num Processed
Mar_21_2011_11:00AM	Waiting to Add	21,040	11,031	10,000	0	0
Feb_18_2012_10:00AM	Waiting to Add	22,000	11,000	11,000	0	0

Process the file

Once the file has been uploaded go to **Admin > Files > Process > Bulk User Uploads**. The recently uploaded file will be shown in the list, initially with -1 under 'Num Recs'.

Click Read Data In for CompanyControls to check the data in the file and examine what can be imported. The *User Bulk Import Summary* section will show the number of employee records that have been found and how many can be imported.

Suggestion

If you have created different files for different types of employees, change the settings in **Admin > Settings > Core Defaults** to suit each file BEFORE clicking Read Data In.

The section *User Bulk Imports* shows the employee data that has been found which can be edited prior to clicking Add any possible user(s) in *User Bulk Import Summary*.

User Bulk Imports Summary									
Total Records: 1									
Version/Sub Doc	Uploaded	Num Recs	Num Could Process	Num Has Processed	Num Could Be Added	Num Been Added			
Dec 17 2009 2:31PM Add any possible User(s)	17/12/09 14:32:00	1	1	1	1	0			

User Bulk Imports									
Total Records: 11									
Could Be Proc	Been Proc	Processing Notes	Could Be Added	Was Added	User Added	Forename	Middle Initials	Surname	Email
Y	Y	Default Group will be used, Default Job Type will be used, Default Site Role will be used, Default User Type will be used	Y	-		Joan	H	Ham	joan@mywebworkplace.net

Delayed Emails

Welcome emails to your employees can be delayed prior to releasing them to be sent. This is useful to completely setup your account before allowing access to the system and/or phase the roll out across various departments or locations. It might also be used to setup an employee before their email account has been setup i.e. before their start date and the welcome email can be released to be sent on their employment start date.

To delay the welcome emails go to *Admin > settings > Emails > Email Settings* and untick the check box against 'Send Email to joining user' under *Change this Settings* and click [Submit]. Newly added employees' welcome emails will now collect as a list in *Unsent emails in the email queue*.

To release them, either a selection (i.e. one or more) or all delayed emails can be released. To release all of them check the tick box under *Send all delayed emails from the email queue* against 'Take this action' and click [Submit]. To release one or more, tick the employees welcome email's that need to be sent and click [Submit]. Once this is done, those checked will appear in *Send only flagged delayed emails in the email queue* as a total to be sent. Check the 'Take this action' box and click [submit].

By re-ticking the 'Send email to joining user', the welcome emails will be sent to the employee immediately once they have been added.

Permissions explained

There are 3 types of site wide users in CompanyControls.

- Client Admin
- Senior Management
- User

User	Senior Management	Client Admin
Dashboard	Same as User Plus:	Same as Management plus:
Actions	Groups	Groups > Add
My Details	Areas	Areas > Add
Help	People	People > Add
	Groups > Group > Edit	People > person > Edit/Remove
	Areas > Area > Edit	People > Person > Leave Cycles > entitlement adjustments
	Actions > Sickness Analysis	View: All leave requests/sickness
	View: Group leave requests/sickness	
	Task: Leave approval	
	Task: Sickness Management	

Functional Roles

Each area of business that CompanyControls helps to support has a corresponding Functional role that can be given to any of your employees to give them increased access and permissions in order to manage that particular business area.

Functional roles can be given to employees by going to People > Persons name > Person (dropdown) > functional roles.

Relationship controls

Access is also granted depending on the employees relationship with in your business. For instance if an employee has a site role of User but is also a Group manager, they will have elevated access to the group to which they manage and the employees that belong to that group.

Email Notification

For many of the tasks with in CompanyControls an email will be sent to either the Employee or Manager or key individuals to inform them of an awaiting task or notify them of a completed task or event.

To ensure that your employees receive these emails you should add the following domains to your email white list/safe senders list:

- ➔ Companycontrols.pro
- ➔ Supportishr.com
- ➔ EWAssist.co.uk
- ➔ Mwwwp.me

File Storage

Upload files:

File can be uploaded when you see an upload link at the end of a record or when you see an upload form:

Sick Notes (1) ?										
<u>Note Ref</u>	<u>Note Type</u>	<u>Status</u>	<u>Cert From</u>	<u>Cert To</u>	<u>Cert Days</u>	<u>Seen</u>	<u>Added</u>	<u>By</u>	<u>Updated</u>	<u>By</u>
SN001230	Self Cert	Submitted	Tue 05 Dec 2017	Wed 06 Dec 2017	2		26/02/18 12:47	DB	26/02/18 12:47	DB Upload
Add New										

Support Documents (0) - <u>Upload</u>						
<u>File Title</u>	<u>Ver/Sub Doc Ref</u>	<u>Mb</u>	<u>Filename</u>	<u>Latest</u>	<u>Size</u>	<u>Doc Ref</u>
No records						

Add File upload

File Class: Medical

File: (*)

Ver/Sub Doc Ref: Latest:

Limitations: Max File Size: 2Mb Extension Types: *.xls*;*.*doc*;*.*pdf*;*.*txt*;*.*tif*;*.*ppt*;*.*jpg

Filename: No file chosen (*)

To minimise file storage space, unless it is a working/template document (.doc/.xls etc), we recommend that you print or scan to a PDF format to upload.

To support individual records such as Doctor/Fit Notes for sicknesses or external reports/photos for injuries.

Company wide documents for all staff such as company policies, monthly newsletters and company insurance documents. Admin > Settings > Files

Employee specific documents such as contract of employment, offer letter and annual salary reviews.

Group/list documents for a selection of employees such as first aiders or sales teams.

Contact Support

Customer Service

Contact customer service to get help with:

- Pre-sales enquiries
- To place an order
- Upgrades
- Cancellations

Call 0844 736 1820 ext 1

Technical Support

For technical issues

Raise a support ticket [here](#)

Email your support request to – support@companycontrols.net

Call 0844 736 1820 ext 2 (available between 9.00 and 17.30 GMT)

Other lines of support

Help Centre - <https://companycontrols.zendesk.com/hc/en-us>

Blog - <http://blog.companycontrols.net/>

Resources - <http://blog.companycontrols.net/page/Resources.aspx>