



# hh2 User Guide

## Human Resources

For the Administrator and Manager Roles

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## Human Resource Capabilities and Benefits

The HR (Human Resource) Module assists with:

- **Comprehensive Employee Data:** Centralized storage for employee information, covering classifications, certifications, evaluations, raise requests, termination requests, benefit details, pay, EEO-1 stats, and disciplinary events.
- **Mobile Accessibility:** Employees can access relevant data, including their pay stubs through the hh2 My Records Mobile Application, providing flexibility and convenience.
- **Robust Reporting:** HR Managers/Administrators can run reports on the data within the HR Module, facilitating informed decision-making.
- **Data Security:** Security Groups ensure that only authorized personnel can view and manage sensitive employee information.
- **Compliance Management:** The system assists in maintaining compliance by storing and organizing important employee details, contributing to a streamlined and efficient HR management process. When modifications are made to sensitive employee information, the system records the time, date, and user responsible for the changes, ensuring a comprehensive log of all data alterations for accountability and security purposes.

The Human Resource Module streamlines the human resource management process to enhance overall people management and efficiency. Let's get started!

## Users that will Benefit from this User Guide

- Human Resource Clerk
- Field Supervisor
- Project Manager
- HR Manager
- HR Administrator

**Note:** An HR Administrator may also function as an HR Manager.

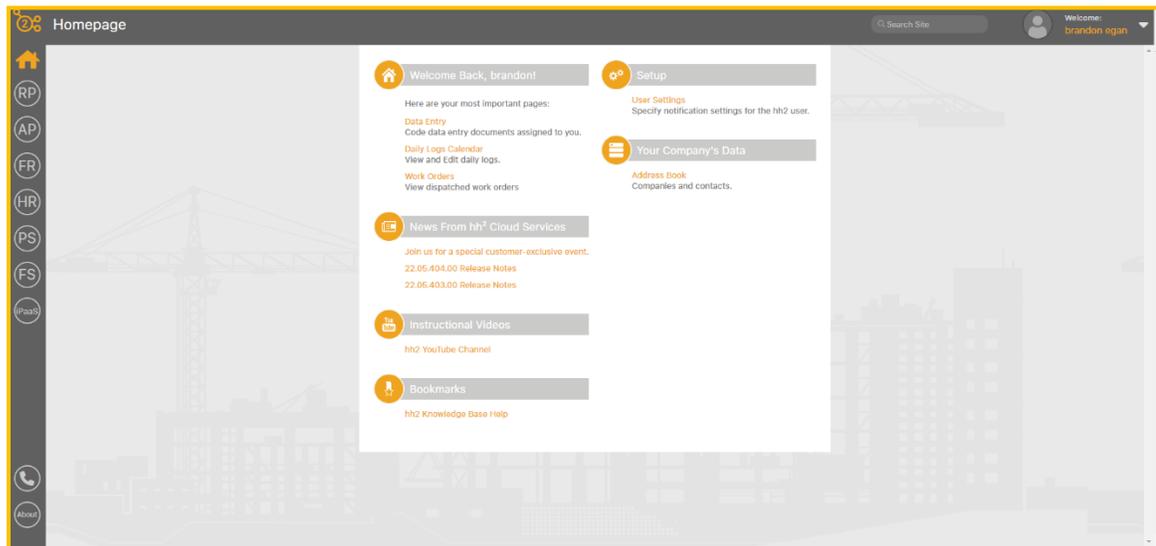
**Note:** A comprehensive Glossary of Terms is available at the end of this document. It includes hh2 terminology for all product areas and some general industry language.

**Note:** This User Guide is intended to be used alongside the software for maximum comprehension.

# Home Page

Upon log in, the user is brought to the Home Page.

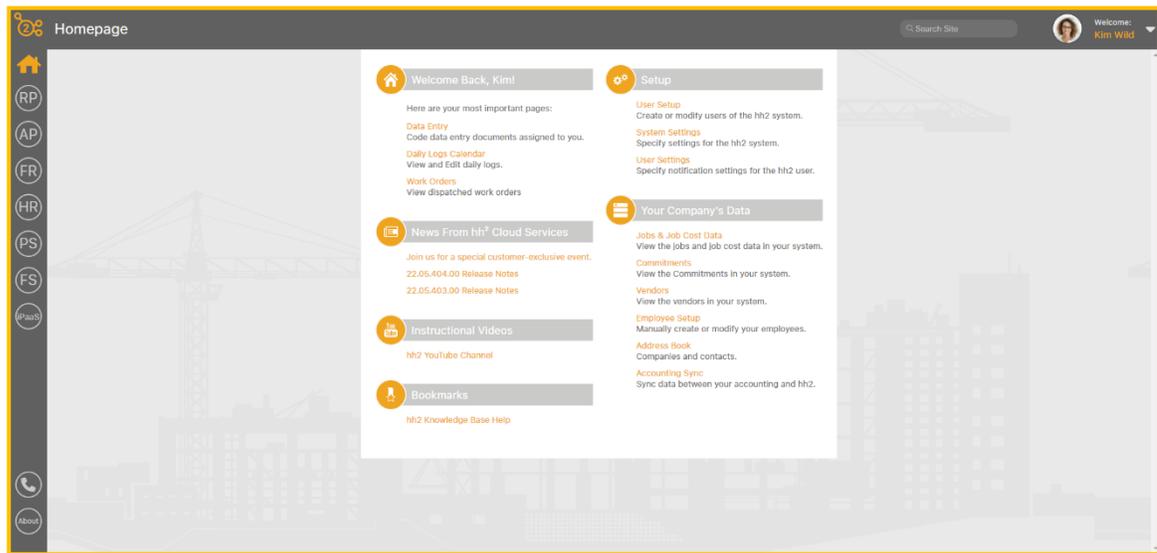
The Home Page will appear differently for different users depending on the modules purchased, the user role, and permissions granted.



This is an example of how the Home Page may appear for a Foreman out in the field.

**Note:** The Home Page  icon is present on all pages. A colored Home Page icon indicates the user is situated on the Home Page. Use this icon to navigate back to the Home Page.

This is how a Home Page may appear for users such as a manager, with many permissions.



The Modules the user has access to are listed in the left column.

Modules include:

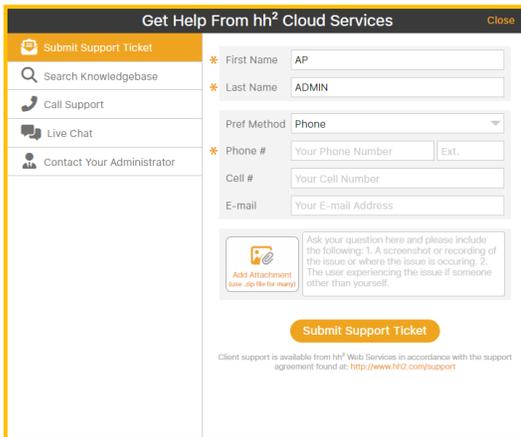
- Remote Payroll indicated by the RP link.
- Document Flow indicated by the AP link.
- Field Reports indicated by the FR link.
- Human Resources indicated by the HR link.
- Pay Stubs indicated by the PS link.
- Field Service indicated by the FS link
- The iPaaS Channel iPaSS link. This channel is for users that synchronize data between the hh2 and 3<sup>rd</sup> party providers such as Procore, Autodesk and Trimble.

Each link will take the user to the associated module of the hh2 system by clicking on it.

The Phone  icon sits below the Module links. The Phone icon is used to reach out to hh2 Customer Support, after the implementation process. When selected, the Get Help From hh2 Cloud Services Page displays.

### To Submit a Customer Support Ticket:

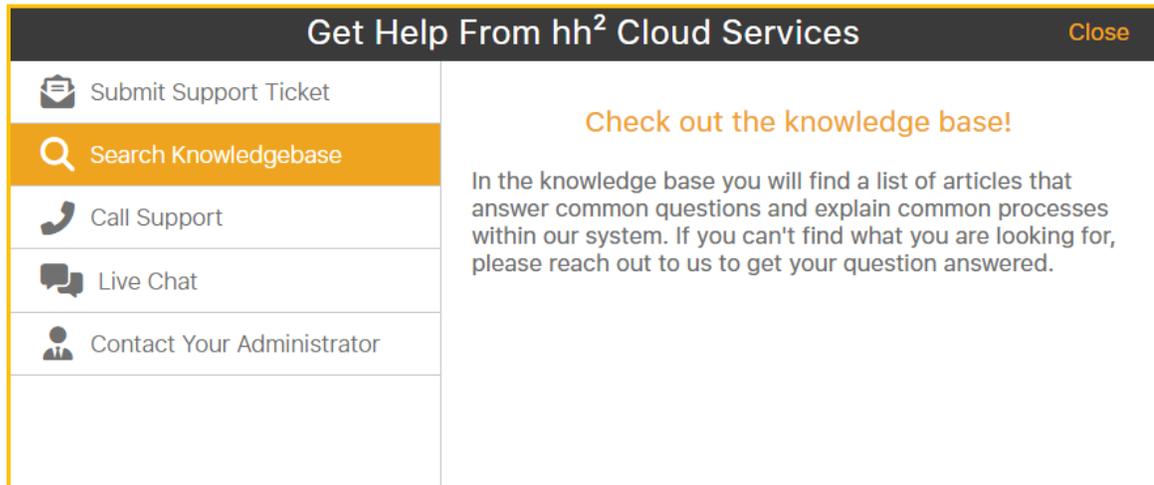
1. Go to the Home Page.
2. Select the Phone Icon.



3. Select the Submit Support Ticket tab in the upper left corner.
4. Enter any information that has not automatically populated from the User Profile.
5. Select Add Attachments if there are supporting documents.
6. Select Submit Support Ticket.
7. A Customer Support Agent will reach the individual with the contact information provided.

## To Search the Knowledgebase:

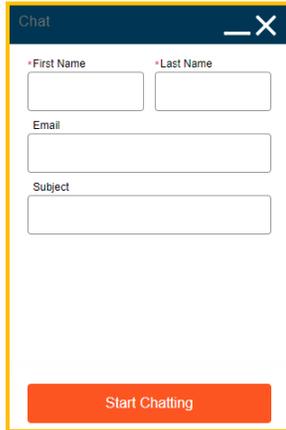
1. From the Home Page, select the Phone icon.
2. Select Search Knowledgebase.



3. Click on the words, “Check out the knowledge base!”
4. Search the knowledge base using key words in the Search field or select a box by product area.
5. Close the browser when complete to return to the Home Page.

## To Contact hh2:

1. Select the Contact Us  icon at the bottom of any page. This will be displayed for Administrators only.



A screenshot of a 'Chat' form. The form has a dark blue header with the word 'Chat' and a close button (X). Below the header are four input fields: 'First Name', 'Last Name', 'Email', and 'Subject'. At the bottom of the form is an orange button labeled 'Start Chatting'.

2. Enter the data requested.
3. Select Start Chatting.



A screenshot of the chat interface. The header shows 'Franco B' and a close button (X). The main area is empty. At the bottom, there is a text input field with the placeholder 'Type your message...' and a timestamp 'Chat started at 8:20 AM'.

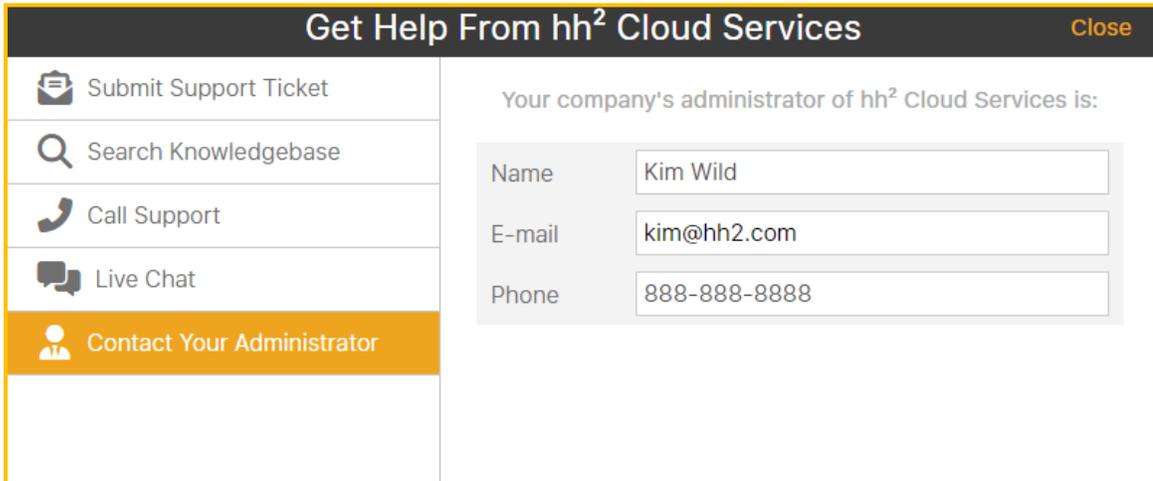
4. Type your message and an expert will reply.
5. When complete, select X.
6. Select Confirm End Chat.
7. Select Close.

**Note:** Call Support and Live chat are an add on subscriptions available to Pro Support customers and only available to users with System Administrator permissions enabled.

## To Contact Your Administrator:

This allows the user to contact the system administrator at the construction company.

1. From the Home Page, select the Phone icon.
2. Select the Contact Your Administrator tab.



The screenshot shows a help interface titled "Get Help From hh<sup>2</sup> Cloud Services" with a "Close" button in the top right. On the left is a vertical menu with five options: "Submit Support Ticket", "Search Knowledgebase", "Call Support", "Live Chat", and "Contact Your Administrator". The "Contact Your Administrator" option is highlighted in orange. To the right of the menu, the text "Your company's administrator of hh<sup>2</sup> Cloud Services is:" is displayed above a form. The form contains three input fields: "Name" with the value "Kim Wild", "E-mail" with the value "kim@hh2.com", and "Phone" with the value "888-888-8888".

3. The contact information will be provided.

## The About Icon:

The About  icon provides the user with version and server information. This is useful information when contacting Customer Support.

### About The hh<sup>2</sup> Cloud Services Web App Close

hh<sup>2</sup> Cloud Services. ©2005 - 2024 Digital Business Integration.  
[End-User License Agreement](#)

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Client Version	23.11.426.0
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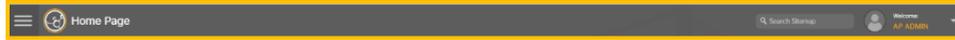
Server Version	Unknown
----------------	---------

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## The Top Task Bar on the Home Page

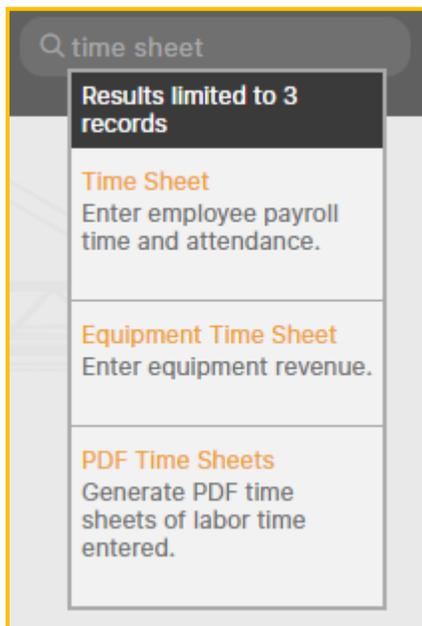
Along the top of the Home Page there are other tools. Those tools include the Search Sitemap tool, the User Avatar, and User Profile Information.



The Search Sitemap  field allows the user to search for any feature the user has permission to access.

### To Use the Search Sitemap:

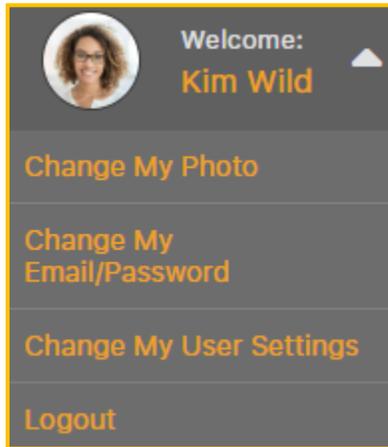
1. Enter a topic or partial topic.
2. The field will auto-populate with potential topics.



3. Select the topic title with a click.
4. The system will automatically navigate the user to the associated hh2 page if permissions are granted to that user.

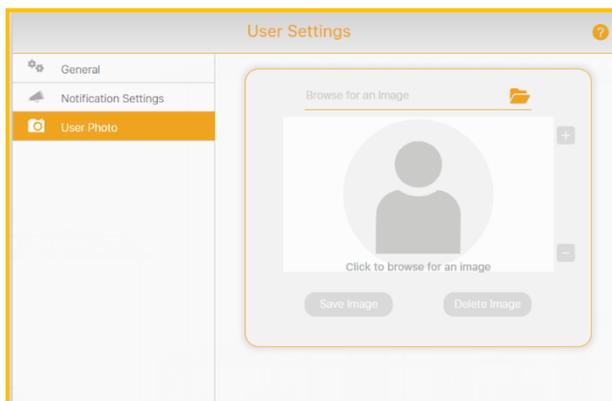
## User Avatar:

By clicking on the User Avatar  icon or username, the Profile Data Picklist and associated links appear.



## To Upload a Photo:

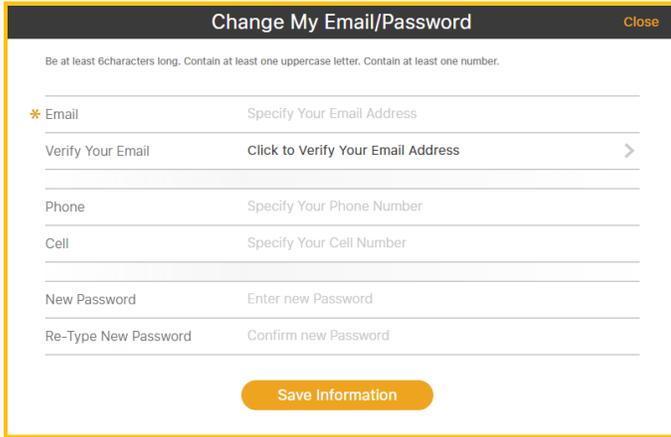
1. Select the User Avatar  icon or username.
2. Select Change My Photo.



3. Select the Folder  icon to browse for an image.
4. Select the file that contains the photo.
5. Select Open.
6. The image can be sized using the + and - icons.
7. Select Save Image.
8. Select Delete Image to delete the current photo.

## To Change Email or Password Information:

1. Select the User Avatar  icon or username.
2. Select Change My Email/Password.



Change My Email/Password Close

Be at least 6 characters long. Contain at least one uppercase letter. Contain at least one number.

\* Email Specify Your Email Address

Verify Your Email [Click to Verify Your Email Address](#) >

Phone Specify Your Phone Number

Cell Specify Your Cell Number

New Password Enter new Password

Re-Type New Password Confirm new Password

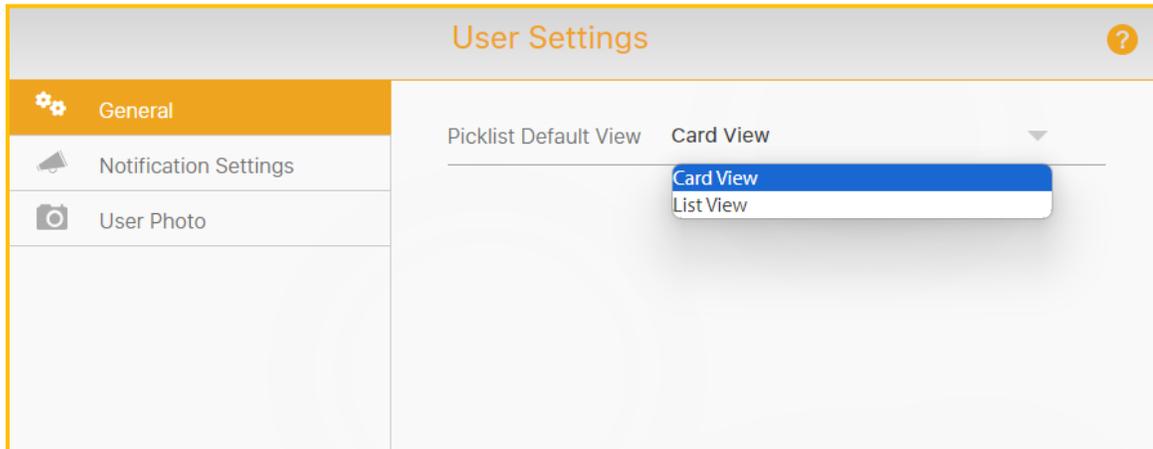
Save Information

3. Enter the Email and Verify the Email Address.
4. Enter Phone and Cell Numbers. These numbers are used for contact information when submitting a Support Ticket.
5. Enter and Confirm a new password.
6. Select Save Information.

## To Change User Settings

User Settings are unique to each user.

1. Select the User Avatar  icon or username.
2. Select Change My User Settings.

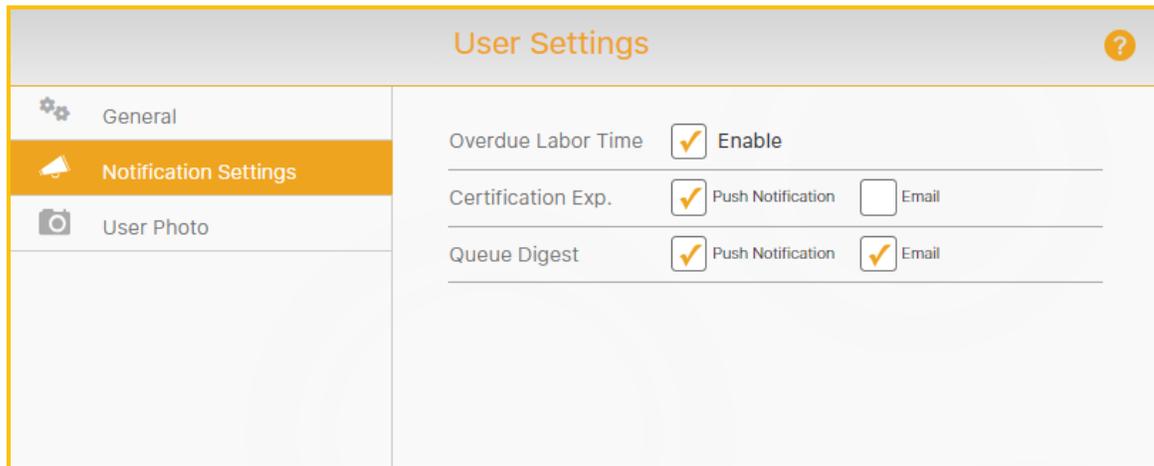


In the **General Tab of the User Settings Page**, users can select their Picklist preference. A Picklist, also known as a dropdown list, is a menu-like interface element often seen in forms and websites, offering users a set of predetermined choices to pick from, enhancing data entry efficiency and uniformity. In hh2 Picklists are either in Card View or List View format. The default is Card View.

### To Select a Picklist Preference:

1. Select the User Avatar  icon or username.
2. Select Change My User Settings.
3. Select the General tab.
4. Click the Picklist arrow.
5. Select user's preference (either Card View or List View).
6. When the Ajax  icon appears, the selection has been saved.

In the **Notification Settings Tab of the User Settings Page**, users can choose how they wish to be notified of events that relate specifically to their job role. For example, a user in the Admin Role may wish to receive notifications when overtime occurs. Other users may wish to know when certifications expire or when actions related to invoices are required by them. These notifications can occur via push notifications, email, both or not at all.



The screenshot shows the 'User Settings' page with the 'Notification Settings' tab selected. The page has a header 'User Settings' with a help icon. The left sidebar contains three tabs: 'General', 'Notification Settings' (highlighted), and 'User Photo'. The main content area displays three settings:

Setting	Push Notification	Email
Overdue Labor Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Certification Exp.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Digest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

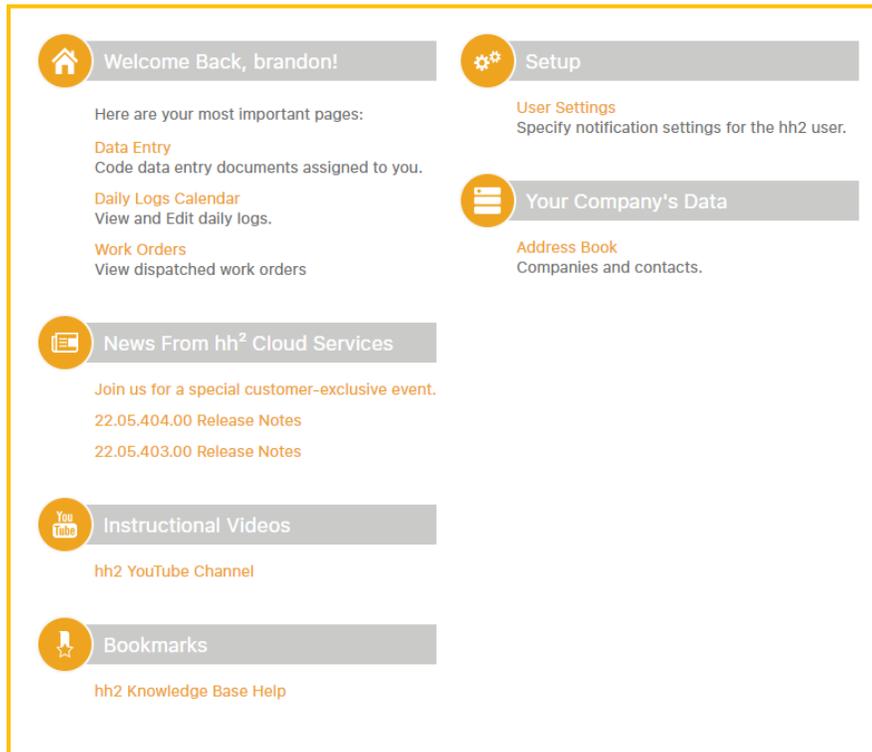
#### To Set Notification Settings:

1. Select the User Avatar  icon or username.
2. Select User Settings>the Notification Settings tab.
3. Check Overdue Labor Time (if using the Remote Payroll Module) to be notified of Overtime.
4. Next to Certification Expiration, check the preferred method of notification when Certifications have expired (if using the HR Module): Push Notification, mail, both or uncheck for no notifications.
5. Next to Queue Digest, check the preferred method of notification when there are Workflow items in the user's Primary Queue to be approved or rejected: Push Notification, Email, both or uncheck for no notifications. This is used in conjunction with the Document Flow module.

**User Photo Tab of the User Settings Page.** See [To Upload a Photo](#).

## The Middle of the Home Page

The appearance of the Home Page's middle section will vary depending on the modules purchased, user roles, and permissions. Administrators and Managers will experience different functionality on their Home Page than other users.



However, all users will have:

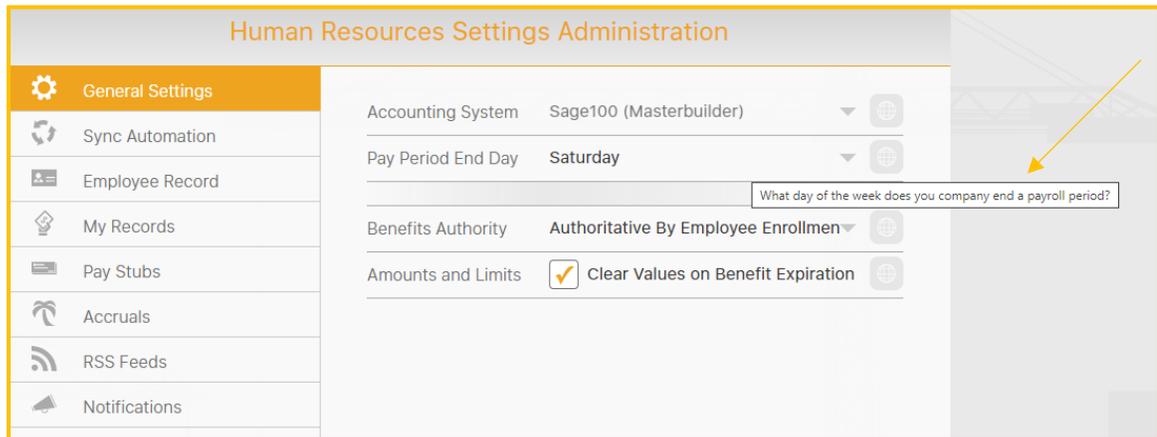
- Their **most important pages**, based on the modules and permissions they use.
- **News From hh<sup>2</sup> Cloud Services**, with information on the latest software updates.
- Links to **Instructional Videos**.
- A **Bookmarks** section that allows quick access to important websites.
- A User **Setup** link to set their personal settings.
- **Your Company's Data**.

## The Tool Tip

Throughout the system, the Tool Tip can be used to obtain a quick description of the associated item.

### To Use the Tool Tip:

1. Hover the mouse over the topic where additional information is needed. In this case, Pay Period End Day. It will turn white.



2. A description will automatically display.

## The HR Process

The HR Process involves a three step process:

1. **System Setup and Access Control:** The initial set up is often done with the assistance of the hh2 Implementation team and includes configuration of roles, system settings, and access control via Security Groups. Later, field users will download the My Records mobile application for use in the field.
2. **Data Entry and Storage:** Essential employee information is synchronized with the accounting system, uploaded, or manually entered. The information is stored and accessed by employees, HR Managers and Administrators and those with permissions by Security Group.
3. **Reporting:** The stored data can be retrieved and compiled for report generation.

## System Setup and Configuration

The hh2 Implementation team will assist HR Administrators with set up. These items must be set up prior to using the HR module.

- ✓ Employee Setup from the Home Page (Home Page>Your Company's Data>Employee Setup). This data is pulled from the accounting system. It is best practice to deactivate inactive employees.
- ✓ User Set Up from the Home Page (Home Page>Setup>User Setup>Permissions). The Administrator must have access as a System Administrator. Other users can be granted privileges HR module as well.
- ✓ User Setup for the Home Page (Home Page>Setup>User Setup>User Mappings). Each employee will need to be mapped to their own employee record so they may access the employee record from the My Records Mobile Application.
- ✓ Users must be assigned Site Roles (Home Page>Setup>User Setup>Site Roles). HR Administrators can set up and configure the HR system. HR Managers have access to manage employee records based upon access configured by the HR Administrator. The HR Crew Dashboard setting allows for managers to view employee records in a dashboard type view. The HR Employee setting grants users access to their own personal employee records.
- ✓ System Settings from Human Resources (HR>Settings>System Settings). HR Administrators may use this menu to configure various site settings for the HR module.
- ✓ Human Resources Configuration (HR>Configuration). The menus within this HR section are utilized in creating and maintaining HR data.
- ✓ The My Records download for the field employee's use from the Google Play Store or the Apple Store.



- The Settings and Configuration sections of the Human Resources Page are used for system set up.
- The General, Reporting and Enterprise sections are for regular use. The sections used are based primarily on the construction company's needs and preferences.

## Employee Set Up

First, employees must be in the system in order to manage their Employee Record.

**Navigation: Home Page>Your Company's Data>Employee Setup.**

Employee Setup (66 Employees)

Enter keyword to search      Active Employees      [Handshake] [Person] [Plus]

<b>Banks; Amanda S</b> #133 tanderson@hh2.com Rehired: Nov 26, 2009	<b>Beaman; Blake</b> #160 Hired: Apr 3, 2007	<b>Case; Backhoe</b> #201 fake@hh2.com Hired: Feb 7, 2017
<b>Damon; Brent</b> #125 bdamon@gmail.com Hired: Jan 20, 1990	<b>Dean; Jim</b> #162 JimDean@msn.com Hired: Mar 19, 2005	<b>Dirk; Joe</b> #164 camrysam3@yahoo.com Hired: May 27, 2006

- Employees may be manually added, activated, or deactivated.

## To Add an Employee:

1. Navigate to the Home Page>Your Company's Data>Employee Setup.

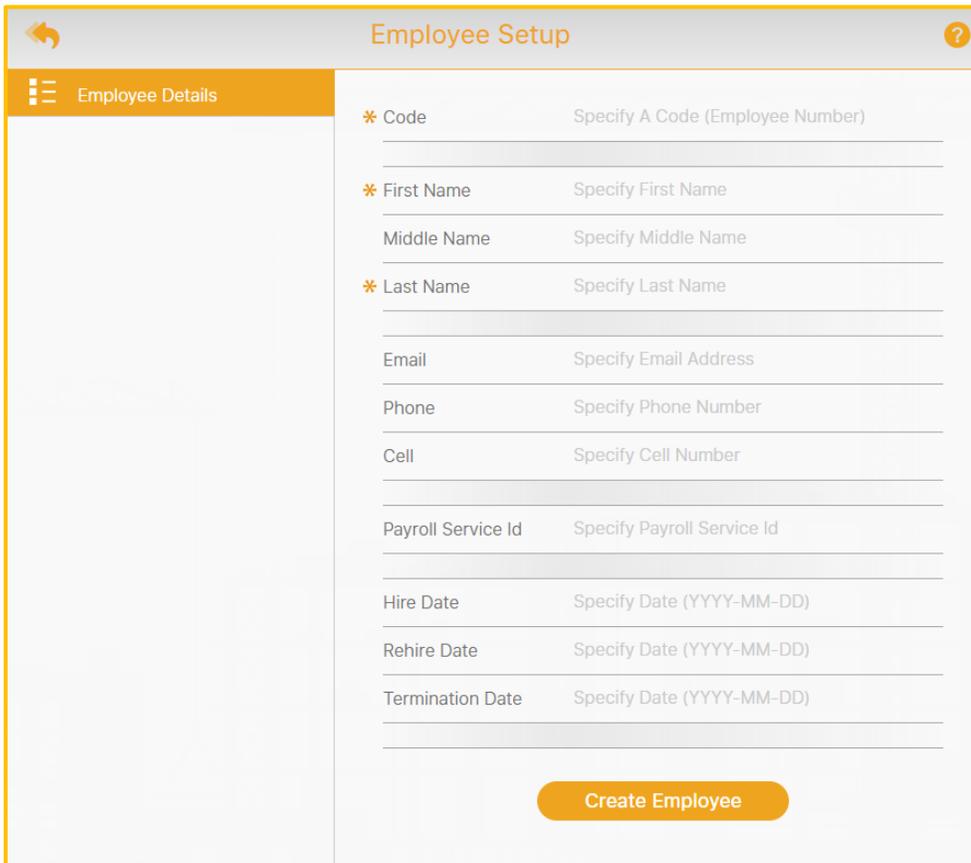


**Employee Setup (66 Employees)**

Enter keyword to search    Active Employees    [Handshake] [Person] [Add]

<b>Banks; Amanda S</b> #133 tanderson@hh2.com Rehired: Nov 26, 2009	<b>Beaman; Blake</b> #160 Hired: Apr 3, 2007	<b>Case; Backhoe</b> #201 fake@hh2.com Hired: Feb 7, 2017
<b>Damon; Brent</b> #125 bdamon@gmail.com Hired: Jan 20, 1990	<b>Dean; Jim</b> #162 JImDean@msn.com Hired: Mar 19, 2005	<b>Dirk; Joe</b> #164 camrysam3@yahoo.com Hired: May 27, 2006

2. Select the Add  icon.



**Employee Setup**

Employee Details

\* Code    Specify A Code (Employee Number)

\* First Name    Specify First Name

Middle Name    Specify Middle Name

\* Last Name    Specify Last Name

Email    Specify Email Address

Phone    Specify Phone Number

Cell    Specify Cell Number

Payroll Service Id    Specify Payroll Service Id

Hire Date    Specify Date (YYYY-MM-DD)

Rehire Date    Specify Date (YYYY-MM-DD)

Termination Date    Specify Date (YYYY-MM-DD)

**Create Employee**

3. Enter the employee's information including the Code, Name, Email Address, Phone numbers, Payroll Service Id, and Hire Date.
4. Select Create Employee.
5. After Create Employee is selected, two additional tabs display. They are Employee Photo and Employee Mappings.

**To Add a Photo:**

1. Select the Employee Photo tab.
2. Browse for a photo using the Folder  icon.
3. Select the image and choose Open.
4. Select Save Image.
5. The image will now display on the employee's record.

**To Delete a Photo:**

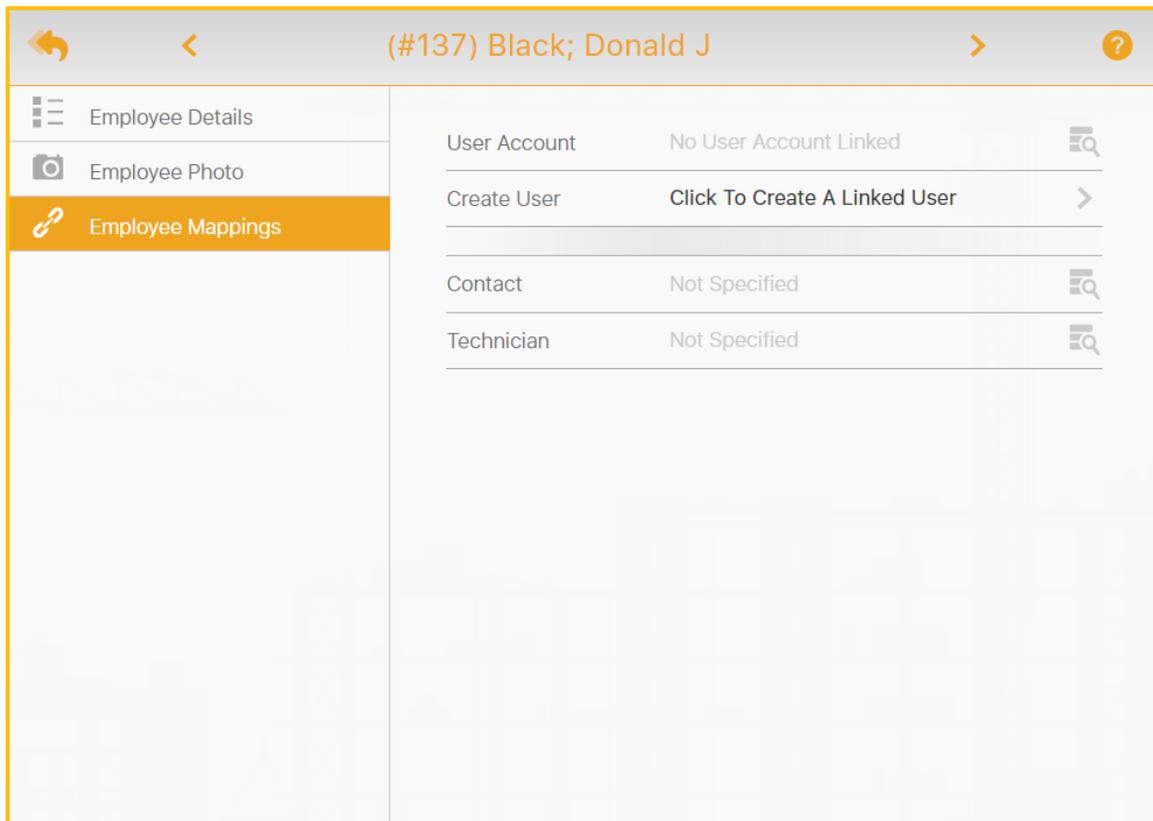
1. Select the Employee Photo tab.
2. Select Delete Image.
3. The image immediately deletes.

**To Zoom In or Out:**

1. Select the Employee Photo tab.
2. Use the  to display the photo larger.
3. Use the  to display the photo smaller.

## To Map an Employee from Employee Setup:

1. Select the Employee Mappings tab.



2. Select the Magnifying  icon next to the User Account and select the employee on the Select A User Page that follows.

### To Activate Employees:

1. This will activate all employees who are currently employed based on hire/rehire and termination dates.
2. Navigate to Home Page>Your Company's Data>Employee Setup.
3. Select the Activate  icon. **Note:** The Picklist selection (Active Employees, Inactive Employees or All Employees) may assist in filtering data based upon what the user wishes to accomplish.

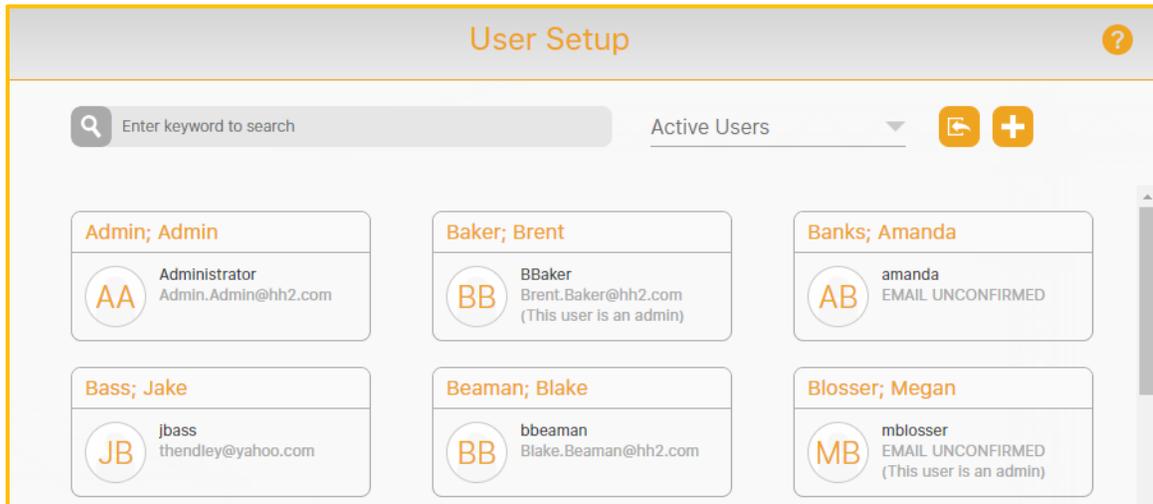
### To Deactivate Employees:

1. This will deactivate all employees considered unemployed based on hire/rehire and termination dates.
2. Home Page>Your Company's Data>Employee Setup.
3. Select the Deactivate  icon. **Note:** The Picklist selection (Active Employees, Inactive Employees or All Employees) may assist in filtering data based upon what the user wishes to accomplish.

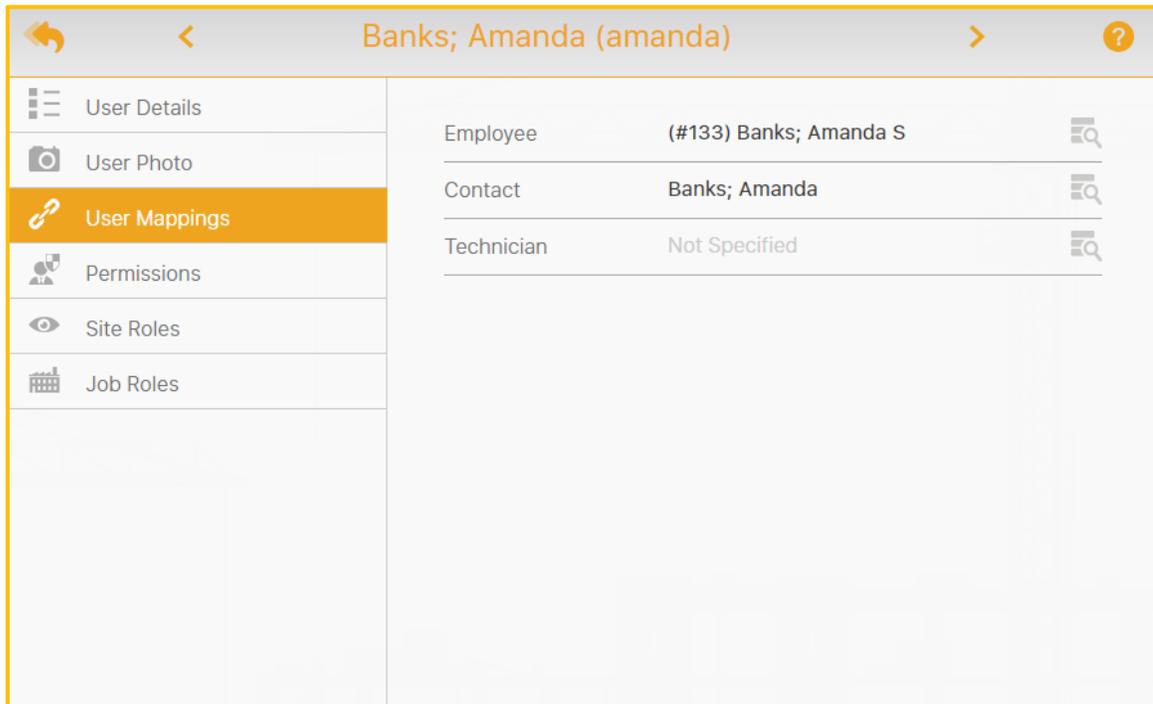
## User Permission Setup

After employees are set up, they must be granted permissions. Various settings may be set to either grant or limit user permissions to HR module access and editing abilities. Any user needing full configurability and access to the HR module will need to have the HR Administrator permission enabled. User Mappings, Permissions, Site Roles, and Job Roles must be set up for all users as well.

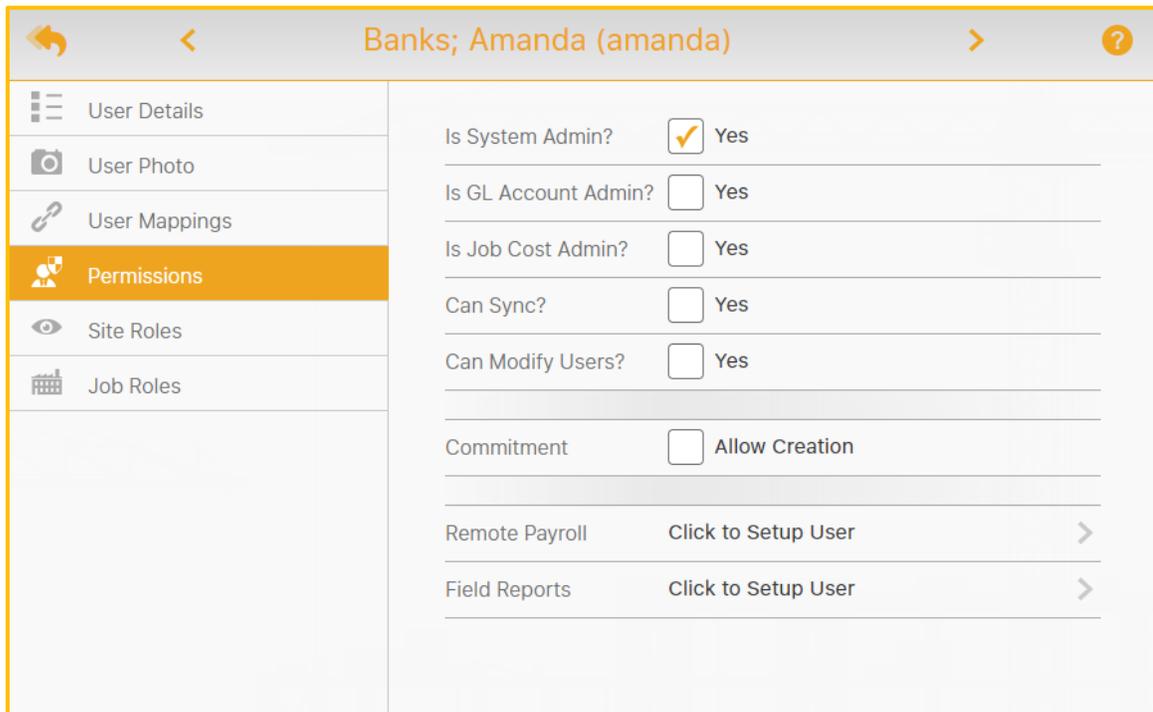
1. Navigation: Homepage>Setup>User Setup.



2. Select the user.



3. Select the User Mappings tab. This process will map the user to their employee record. **Note:** This process may have already been completed during Employee Set Up. If not, proceed with the following steps.
4. Enter the employee's name in the Employee field by using the Magnifying  icon. Select the employee.
5. Enter the employee's name in the Contact field by using the Magnifying  icon. Select the employee.
6. Next, select the Permissions tab to grant the user permissions. This step is done to grant the HR Administrator administrative privileges. For all HR Administrators, check Is System Admin. This provides the HR Administrator with the ability to set up and configure the HR system. Leave unchecked if the user will not function in this manner.



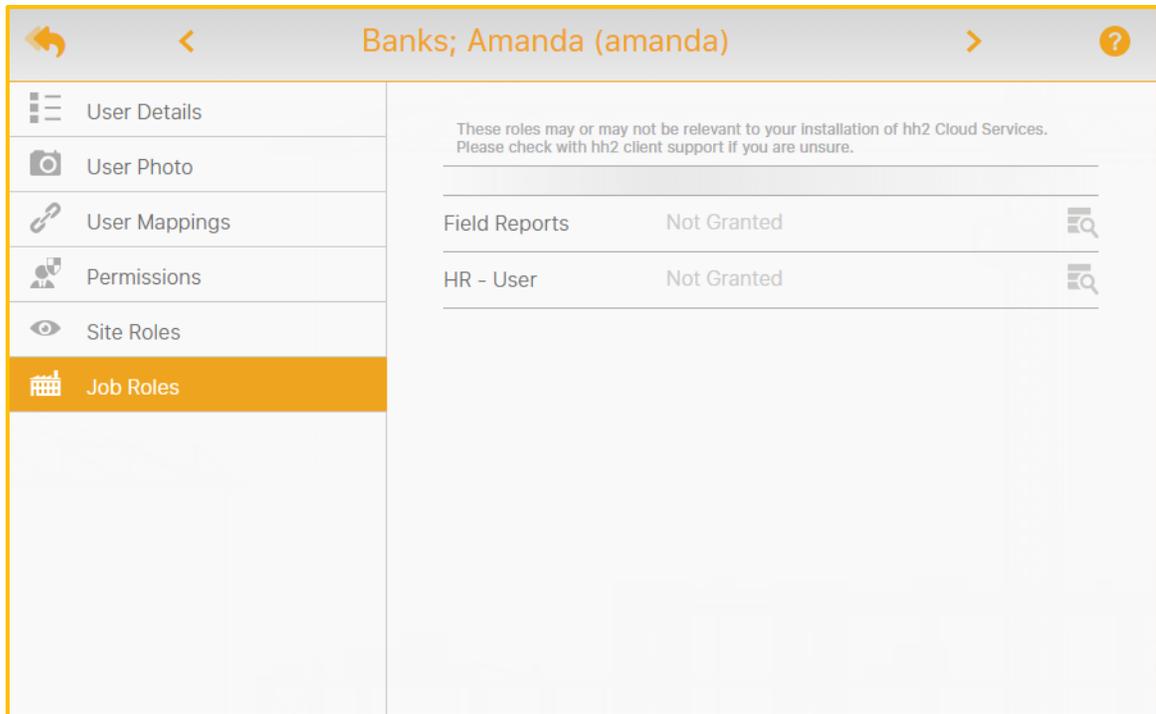
Banks; Amanda (amanda)	
User Details	
User Photo	
User Mappings	
<b>Permissions</b>	
Site Roles	
Job Roles	
Is System Admin?	<input checked="" type="checkbox"/> Yes
Is GL Account Admin?	<input type="checkbox"/> Yes
Is Job Cost Admin?	<input type="checkbox"/> Yes
Can Sync?	<input type="checkbox"/> Yes
Can Modify Users?	<input type="checkbox"/> Yes
Commitment	<input type="checkbox"/> Allow Creation
Remote Payroll	Click to Setup User >
Field Reports	Click to Setup User >

7. Provide the HR Administrator (or other users) with other privileges, as needed. For instance, check Is GL Account Admin, Is Job Cost Admin, Can Sync, Can Modify Users, Allow Creation of commitments, as needed to provide the ability to exercise the associated function. If a user will not need to perform those functions, leave unchecked.
8. If the HR Administrator (or other users) will work with the Remote Payroll, or Field Reports modules, they must be set up as Remote Payroll and Field Report users, using the Remote Payroll and Field Reports fields, respectively.

9. Next, select the Site Roles tab.

Role	Yes
AB Admin	<input type="checkbox"/>
AB Viewer	<input type="checkbox"/>
Combined Equipment	<input checked="" type="checkbox"/>
FR user	<input type="checkbox"/>
FS Administrator	<input type="checkbox"/>
FS Dispatcher	<input type="checkbox"/>
FS Manager	<input type="checkbox"/>
FS Technician	<input type="checkbox"/>
Field Reports Admin	<input type="checkbox"/>
HR Admin	<input checked="" type="checkbox"/>
HR Crew Dashboard	<input type="checkbox"/>
HR Employee	<input checked="" type="checkbox"/>
HR Manager	<input checked="" type="checkbox"/>
TimePilot Terminal Adm	<input type="checkbox"/>

10. Check the appropriate permission(s) to grant to the user. As noted, HR Administrators can set up and configure the HR system (select HR Admin to grant this privilege). In contrast, HR Managers have access to manage employee records based upon access configured by the HR Administrator through Security Groups (select HR Manager to grant this privilege). The HR Crew Dashboard setting allows for managers to view employee records in a dashboard type view (select HR Crew Dashboard to grant this privilege), and the HR Employee setting grants users access to their own personal employee records (select HR Employee to grant this privilege).
11. Next, select the Job Roles tab. This provides HR users access to certain jobs.

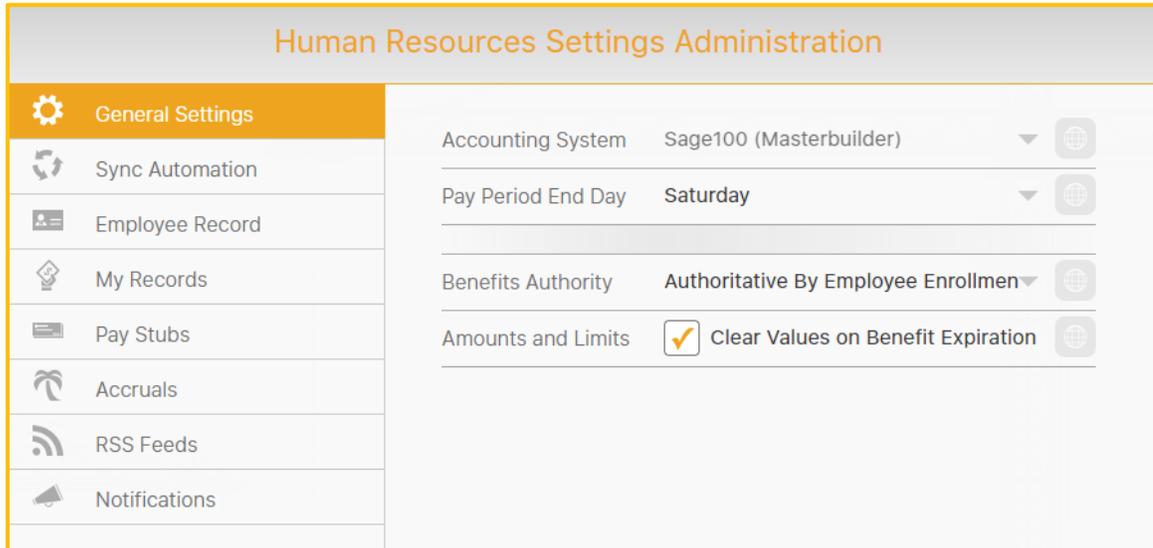


12. Select the Magnifying  icon next to the HR-User field.
13. Select the Jobs from the Not Assigned section using the Add  icon. This will move Jobs into the Assigned Jobs section and provide the user access. This is required when using the Job Dashboard. See [Job Site Dashboard](#).

## System Settings

System Settings are set up with the assistance of the hh2 Implementation team. This section will provide a broad overview of System Settings.

**Navigation: HR>Settings>System Settings.**



Human Resources Settings Administration	
 General Settings	
 Sync Automation	
 Employee Record	
 My Records	
 Pay Stubs	
 Accruals	
 RSS Feeds	
 Notifications	
Accounting System	Sage100 (Masterbuilder)  
Pay Period End Day	Saturday  
Benefits Authority	Authoritative By Employee Enrollment  
Amounts and Limits	<input checked="" type="checkbox"/> Clear Values on Benefit Expiration 

## General Settings Tab

**Navigation: HR>Settings>System Settings>General Settings tab**

The General Settings tab, allows the HR and hh2 Administrator to set up the following:

- The ERP accounting system being used.
- The Pay Period End Day for the construction company (Sun-Sat).
- The Benefits Authority setting determines how much authority hh2 has to sync employee fringes and deductions back into the company's ERP accounting system (Do Not Sync, Global Sync or By Employee Enrollment).
- Amounts and Limits (should amounts of fringes and deductions be cleared in the accounting system when they have expired, if so check).

## Sync Automation Tab

Navigation: HR>Settings>System Settings>Sync Automation tab

The screenshot shows the 'Human Resources Settings Administration' interface. The 'Sync Automation' tab is selected in the sidebar. The main content area contains a note and several settings:

Note: Automations execute once an hour. You may have to wait up to an hour before new data (jobs, etc.) are applied. In most cases, assignments are applied, but not unapplied. Once assignments are made, they can only be removed manually via the relevant setup page.

Group Job Access	Disabled	▼	🌐
Job Locations	<input type="checkbox"/> Enabled		🌐
Classification	Disabled	▼	🌐
Cert. Class	<input type="checkbox"/> Enabled		🌐
Occupation	<input type="checkbox"/> Enabled		🌐
Title	<input type="checkbox"/> Enabled		🌐

The Sync Automation tab allows the HR Administrator and hh2 Administrator to enable or disable automatic synchronizations for the following:

- **Group Job Access:** When enabled, it auto assigns employees to locations based on where their time is coded within the Remote Payroll (RP) module. The number of days chosen determines how many days must pass where the employee has not coded to the job before they are auto unassigned from the location.
- **Job Locations:** When enabled, it auto assigns and unassigns employees from job locations based on the default job setup within their employee record.
- **Classifications:** Will auto assign the employee's primary classification based upon their default certified class, occupation, or title setup within their employee record.
- **Certified Classifications:** When enabled, auto creates a classification record for employees based on the default certified class setup on the employee record.
- **Occupations:** When enabled, it auto creates a classification record for employees based on the occupation setup on the employee record.
- **Titles:** When enabled, it auto creates a classification record for employees based on the title set up on the employee record.

## Employee Record Tab

Navigation: HR>Settings>System Settings>Employee Record tab.

Human Resources Settings Administration	
General Settings	Employee Information <input checked="" type="checkbox"/> Enabled
Sync Automation	Classifications <input checked="" type="checkbox"/> Enabled
<b>Employee Record</b>	Locations <input checked="" type="checkbox"/> Enabled
My Records	Certifications <input checked="" type="checkbox"/> Enabled
Pay Stubs	Evaluations <input checked="" type="checkbox"/> Enabled
Accruals	Raise Requests <input checked="" type="checkbox"/> Enabled
RSS Feeds	Benefits <input checked="" type="checkbox"/> Enabled
Notifications	Disciplines <input checked="" type="checkbox"/> Enabled
	Hires <input checked="" type="checkbox"/> Enabled
	Terminations <input checked="" type="checkbox"/> Enabled
	Education <input checked="" type="checkbox"/> Enabled
	Pay & Pay Stubs <input checked="" type="checkbox"/> Enabled
	History <input checked="" type="checkbox"/> Enabled
	Accruals <input checked="" type="checkbox"/> Enabled
	Documents <input checked="" type="checkbox"/> Enabled
	Notes <input checked="" type="checkbox"/> Enabled
	Emergency Contacts 3 Contact Available
	Gender <input checked="" type="checkbox"/> Enabled
	Ethnicity <input checked="" type="checkbox"/> Enabled
	Misc 1 Label Misc1
	Misc 2 Label Misc2
	Supervisor 1 Label Supervisor1
	Supervisor 2 Label Supervisor2
	All AB Locations <input checked="" type="checkbox"/> Enabled
	Display Last 4 of SSN <input type="checkbox"/> Enabled
	Employee Custom Field <input type="checkbox"/> Enabled

These settings allow the HR Administrator and hh2 Administrator to select:

- Which tabs will be enabled on the Employee Record.
- The number of emergency contacts available on the Employee Record. This setting no longer applies, as emergency contacts are unlimited.
- Administrators can choose whether Gender and Ethnicity are fields displayed on the Employee Record.
- Two Miscellaneous Labels can be set up for custom use within the employee record. When left blank, the field will not be available on the employee record.
- Two Supervisor Labels can be set up to title the supervisor fields on the employee record.

- All AB (Address Book) Locations: When enabled allows all address book locations to be available for employee location assignments.
- Display Last 4 of SSN: Allows Administrators to choose whether those with explicit permission can view the entire SSN of employees or if they can only view the last 4 digits. To remove employee SSN from the hh2 site entirely, simply reach out to the hh2 Implementation or Support team for further assistance.
- Employee Custom Field: When enabled, it displays employee custom field data from the accounting system within the hh2 employee records.

## My Records Tab

Navigation: HR>Settings>System Settings>My Records tab.

The screenshot displays the 'Human Resources Settings Administration' interface. On the left, a sidebar lists several settings categories: General Settings, Sync Automation, Employee Record, My Records (highlighted in orange), Pay Stubs, Accruals, RSS Feeds, and Notifications. The main panel shows a list of settings for the 'My Records' tab, each with a checked 'Enabled' status and a globe icon for localization. The settings include: Employee Information, Emergency Contacts, Change Requests, Enrolled Benefits, Pay Stubs, Accruals, and Documents. At the bottom, the 'W-2 Provider URL' is set to <https://efile.aatrix.com/STL032>.

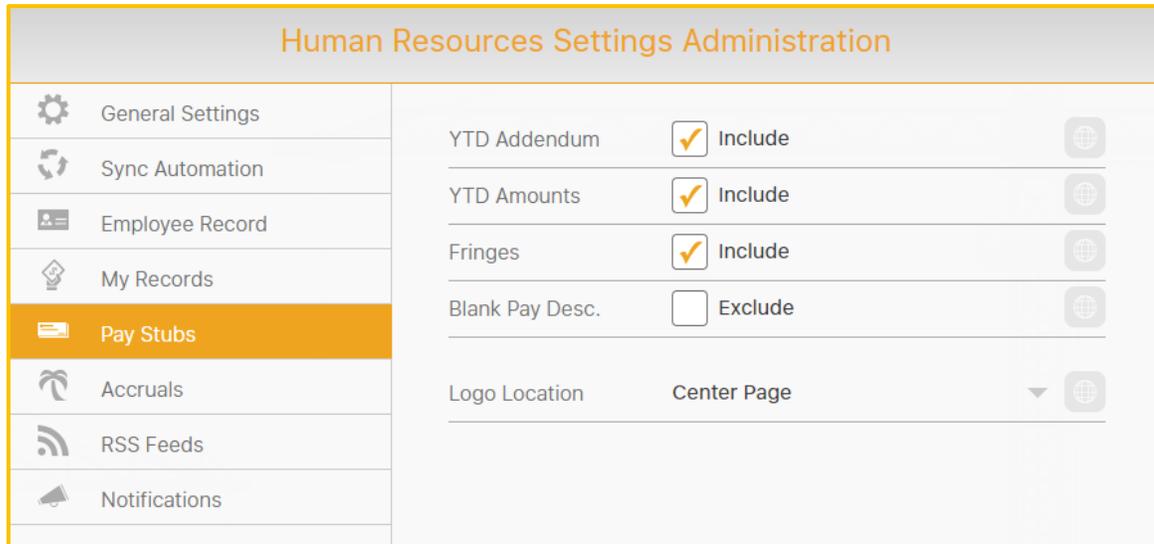
Setting	Status	Localization
Employee Information	Enabled	Yes
Emergency Contacts	Enabled	Yes
Change Requests	Enabled	Yes
Enrolled Benefits	Enabled	Yes
Pay Stubs	Enabled	Yes
Accruals	Enabled	Yes
Documents	Enabled	Yes
W-2 Provider URL	https://efile.aatrix.com/STL032	Yes

These settings allow the HR Administrator and hh2 Administrator to:

- Select which tabs will be enabled on My Records.
- Enter the W-2 Provider URL for the W-2/Tax-Forms link on My Records.

## Pay Stubs Tab

Navigation: HR>Settings>System Settings>Pay Stubs tab.



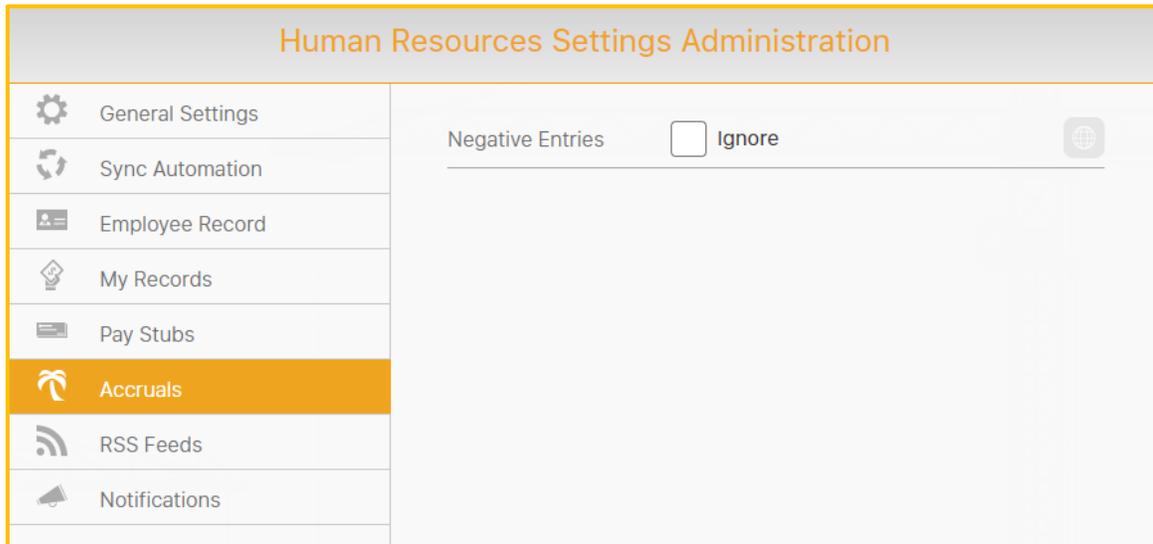
Human Resources Settings Administration			
 General Settings	YTD Addendum	<input checked="" type="checkbox"/> Include	
 Sync Automation	YTD Amounts	<input checked="" type="checkbox"/> Include	
 Employee Record	Fringes	<input checked="" type="checkbox"/> Include	
 My Records	Blank Pay Desc.	<input type="checkbox"/> Exclude	
 Pay Stubs	Logo Location	Center Page	 
 Accruals			
 RSS Feeds			
 Notifications			

If the Pay Stubs module is enabled, these settings allow the HR Administrator and hh2 Administrator to select:

- YTD Addendum: Creates an additional page at the bottom of the Pay Stub.
- YTD Amounts: Displays the Year to Date dollar amounts for enabled employee pay types on Pay Stubs. The amount will only be displayed if the YTD Addendum is enabled. **Note:** By selecting this option, an addendum page will be created at the bottom of the Pay Stub to display the YTD Amounts.
- Fringes: Displays the employer paid portion of the employee's benefits, such as health care costs on Pay Stubs. **Note:** By selecting this option, if YTD Addendum is also enabled, an addendum page will be created at the bottom of the Pay Stub to display the Fringe information.
- Blank Pay Description: To prevent balances for Pay Types without descriptions from displaying on the Pay Stub.
- Logo Placement: The Logo Location from the Picklist (Not Displayed, Top-Right Page, Center Page, Bottom Center Page) determines where company logos will print on the pay stub.

## Accruals Tab

**Navigation: HR>Settings>System Settings>Accruals tab.**



These settings allow the HR Administrator and hh2 Administrator to select:

- Whether negative numbers will be ignored for an accrued Pay Type.

## RSS Feeds Tab

**Navigation: HR>Settings>System Settings>RSS (Really Simple Syndication) Feeds tab.**

RSS is a type of notification system. If users would like to receive these notifications via email, a 3<sup>rd</sup> party service is recommended. The hh2 recommendation for such a service is “If This Then That at <https://ifttt.com>

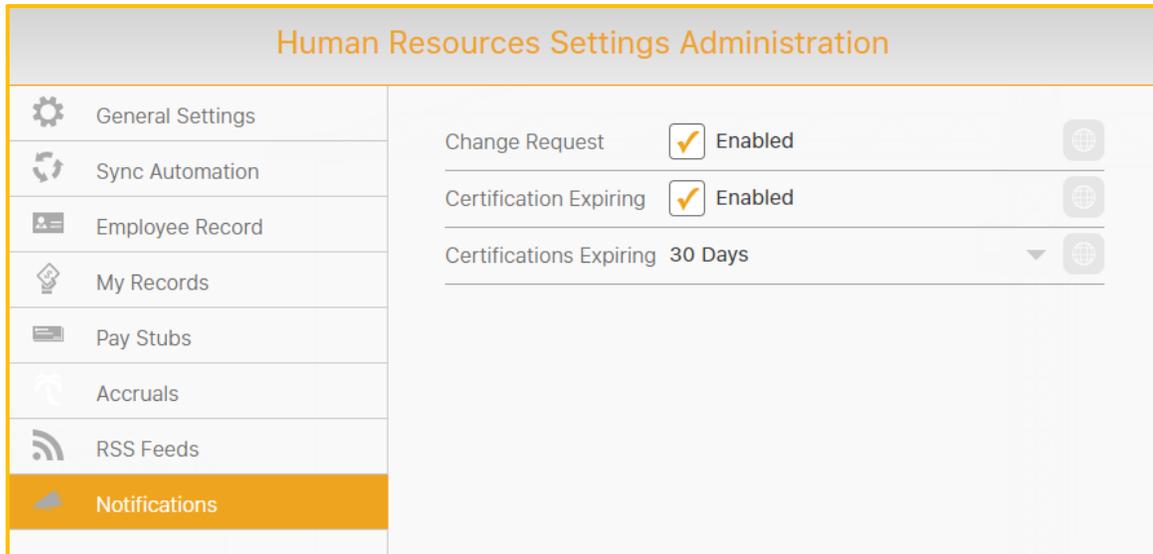


These settings allow the HR Administrator and hh2 Administrator to select:

- The number of days to notify users (that have access to the record) of benefit eligibility.
- The number of days to notify users (that have access to the record) before an employee’s I-9 identification expires and will be out of compliance.

## Notifications Tab

Navigation: HR>Settings>System Settings>Notifications tab.



These settings allow the HR Administrator and hh2 Administrator to:

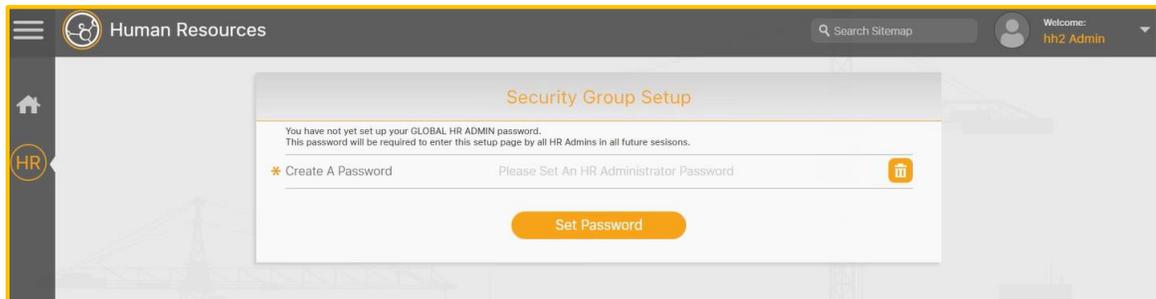
- Enable Change Request and expiring Certification notifications. The Change Request will be sent via a push notification. Certification notifications can be sent as a push notification or via an email.
- Select the number of days before a certification is expired to trigger a warning (indicated in red) on the Employee Record in the Certifications tab.

# Configuration

## Security Group Setup

Security Groups are utilized to categorize users, including HR Managers and other authorized individuals, into specific groups, dictating their access to employee records. The configuration of Security Groups is restricted to System Administrators.

**Navigation:** HR>Configuration>Security Groups

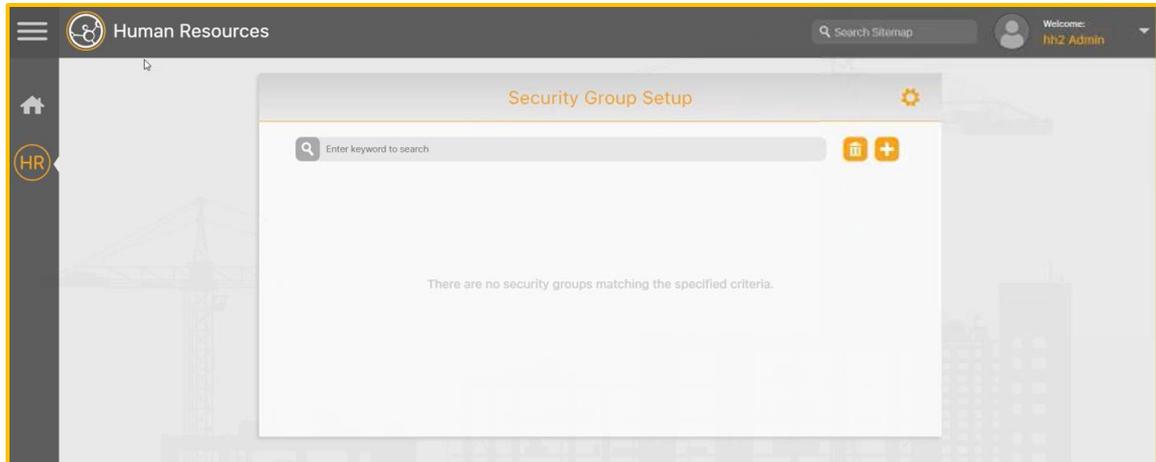


1. Enter a password in the Create A Password field.
2. Select Set Password.

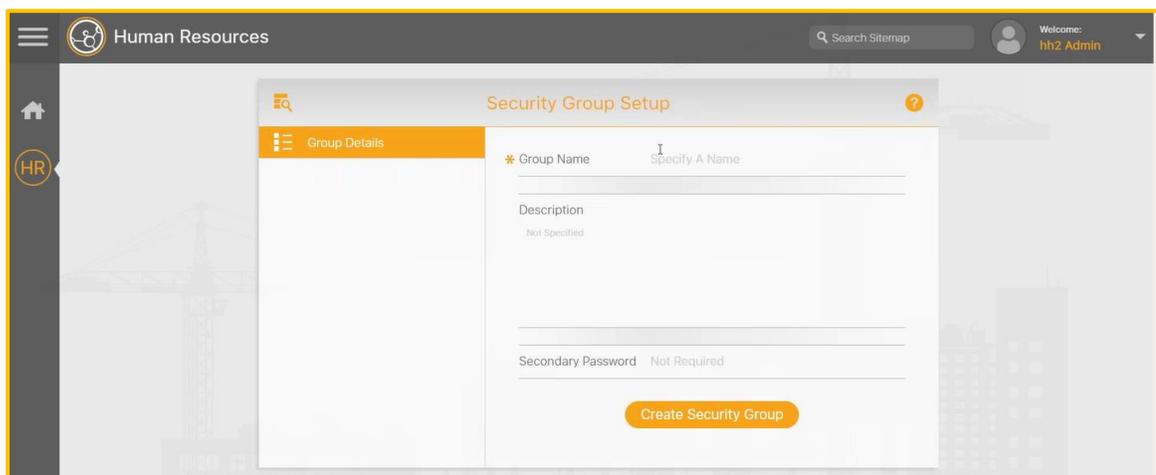
**Note:** This password will be the same password utilized by all HR Administrators to access the Security Groups. For assistance resetting the password reach out to hh2 Support.

## To Add a Security Group:

1. After a password has been created, select HR>Configuration>Security Groups. Enter the password, if necessary.

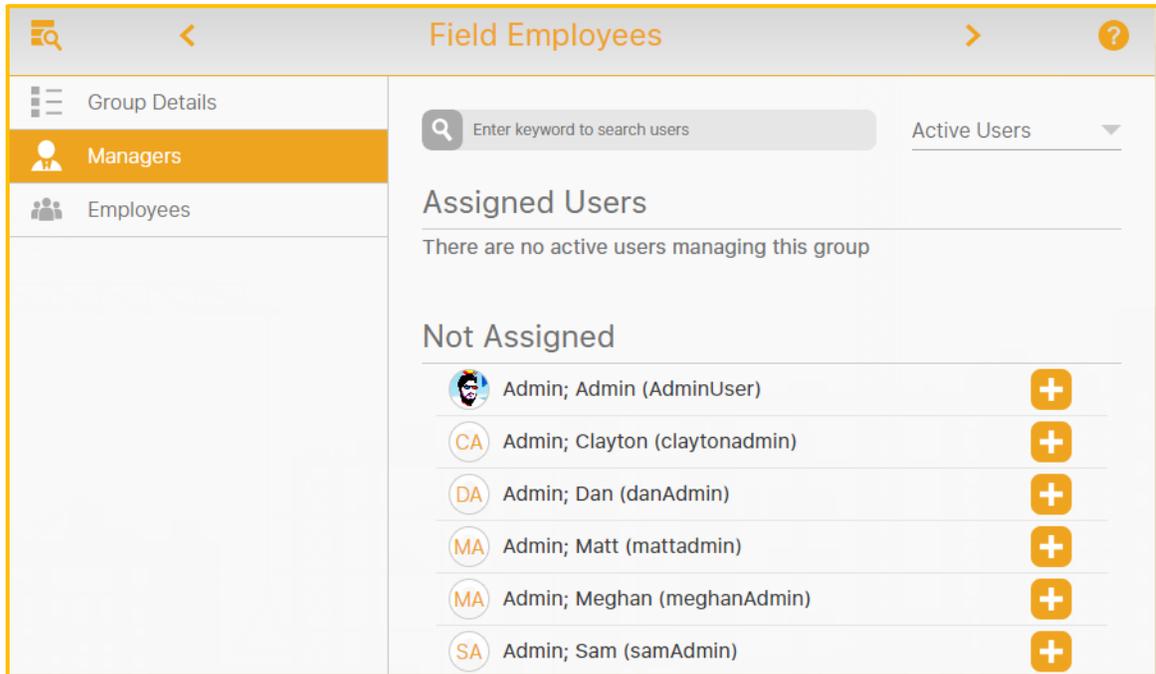


2. Select the Add  icon on the Security Group Setup Page.

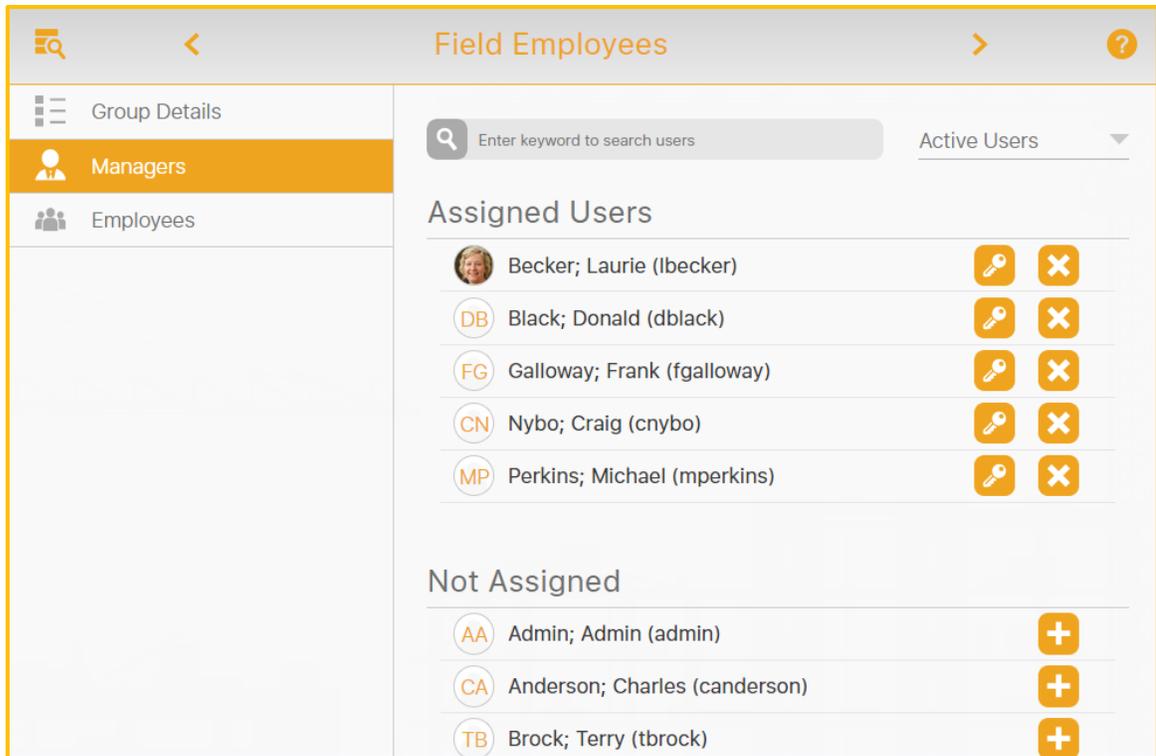


3. Enter the Group Name.
4. Enter an optional Description.
5. Enter an optional Secondary Password (Not currently utilized).
6. Select Create a Security Group.

- The name of the Security Group that was entered in the Group Name field appears at the top of the page. In this example, it is Field Employees.



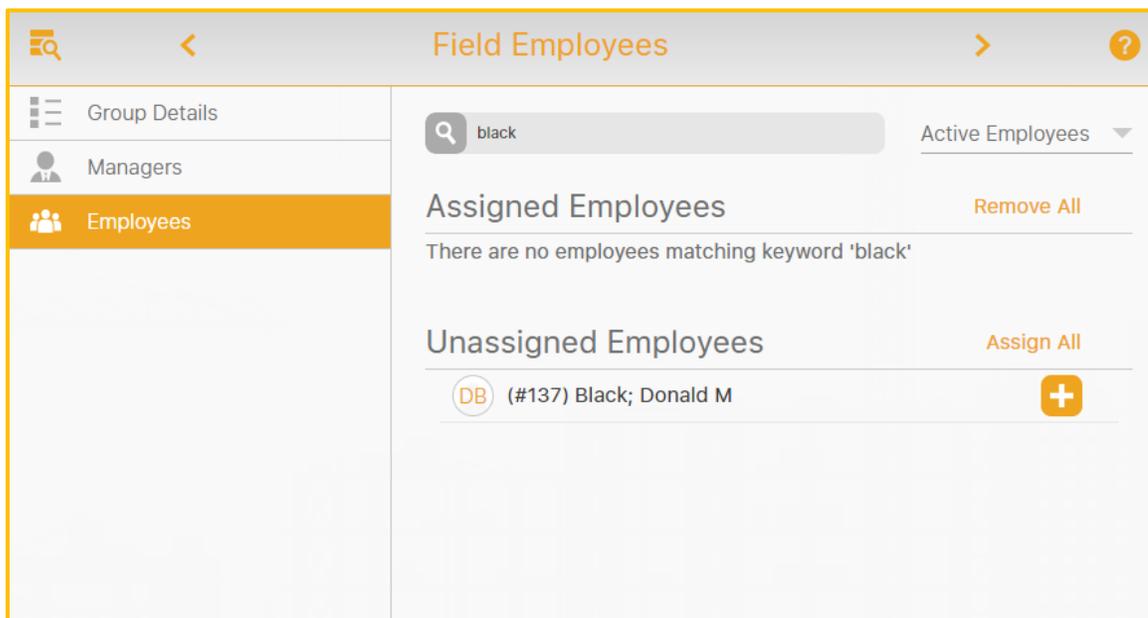
- On the Security Group Page, select the Managers tab.
- Select the Add  icon next to the Not Assigned managers to grant access to employee records for this Security Group. Once added, these users will be listed in the Assigned Users section.



10. Once added and in the Assigned Users section, the Key  icon will appear. Select it to display the Set Manager Permissions Page. On the Set Manager Permissions Page, additional permissions may be granted or excluded for each manager in the Security Group by checking or unchecking. **Note:** Check All is an option.



11. On the Security Group, select the Employees tab.



12. Use the Add  icon to select employees from the Unassigned Employees section to be included in the Security Group. This action will move the Unassigned Employees into the Assigned Employees section. This will provide Assigned Managers in the Security Group access to those employee records. **Note:** Assign All and Remove All are options.

## Accruals

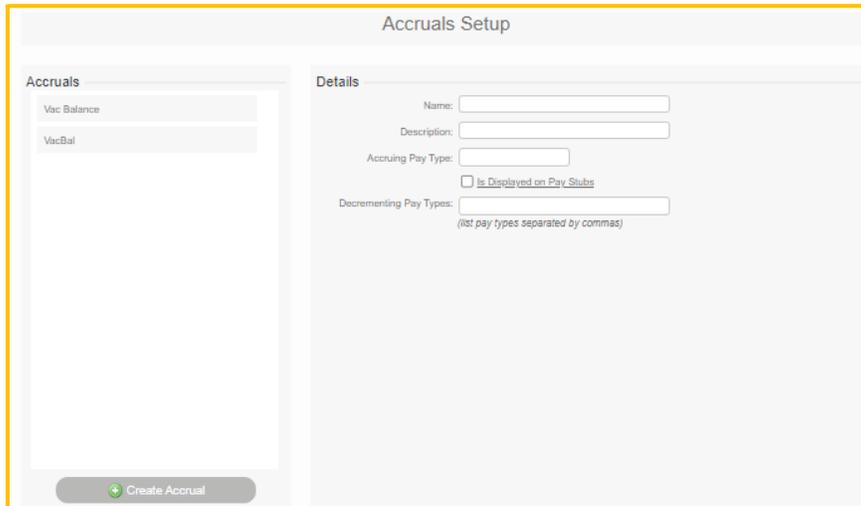
Accruals display on Employee Records, My Records, Job and Crew Dashboards, and Pay Stubs. Time can be accrued in different ways. For some companies, time is accrued based on tenure. For instance, employees with 5 years of tenure with a company may receive 5 weeks of vacation time. Another common way to accrue time is based on the amount of time (hours) worked. For example, one hour of vacation may be accrued for every 20 hours worked.

In relation to the hh2 system, accruals are managed in two different ways:

- Some accruals are set up in the ERP accounting system based upon formulas and create YTD (Year to Date) totals within the Employee Pay Table. These accruals can be displayed on hh2 Pay Stubs with the help of the hh2 Support team, as long as they are set up correctly in the ERP accounting system.
- If accrual YTD totals are not set up in the ERP Accounting system but instead the employee accrues additional time, paycheck to paycheck, hh2 provides an alternative means to track the total accrued time. This set up occurs once. Accrual balances can be viewed on the Employee Record in hh2. This is set up in HR>Configuration> Accruals or in the Pay Stub module (PS>Configuration>Accruals).

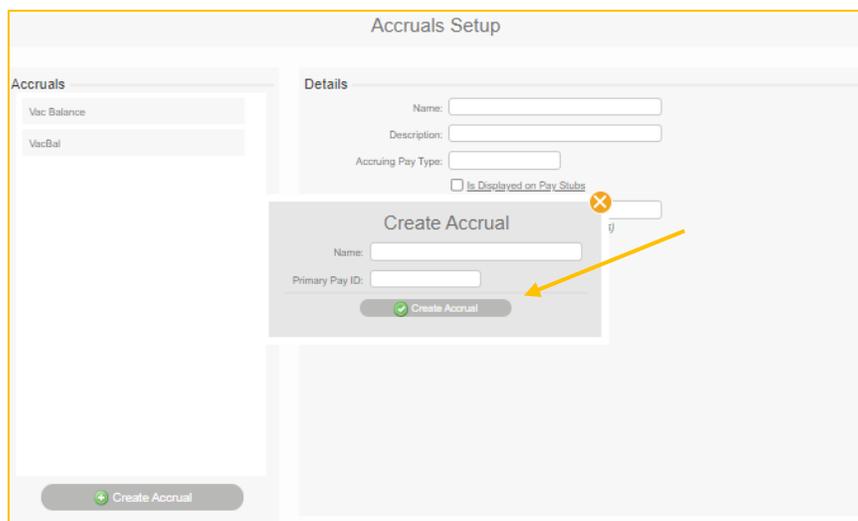
## To Set Up Accruals Using hh2's Alternative Method:

1. First permissions must be granted to set up Accruals. Navigate to the Home Page>Setup>User Setup>select specific employee>Site Role tab>check HR Admin.
2. Navigate to HR>Configuration>Accruals.



The screenshot shows the 'Accruals Setup' form. On the left, there is a list of 'Accruals' with two entries: 'Vac Balance' and 'VacBal'. On the right, the 'Details' section contains several input fields: 'Name', 'Description', 'Accruing Pay Type', a checkbox for 'Is Displayed on Pay Stubs', and 'Decrementing Pay Types' (with a note '(list pay types separated by commas)'). A green '+ Create Accrual' button is located at the bottom left of the form.

3. Determine which Pay Ids (from the accounting system) represent incrementing and the decrementing time.
4. Select Create Accrual.



This screenshot shows the same 'Accruals Setup' form as above, but with a 'Create Accrual' modal window open in the center. The modal has a title bar with a close button (X) and contains a 'Name' field, a 'Primary Pay ID' field, and a green '+ Create Accrual' button. A yellow arrow points to the 'Primary Pay ID' field in the modal.

5. Enter the Name of the Accrual (Such as Paid Time Off) in the Name field in the Create Accrual window.
6. Enter the Primary Pay Identifier (Accruing Pay Type Code from the accounting system). For instance, if the Pay Type called Paid Time Off is set up in the accounting system as #1, then the user will enter #1 in this field.

7. Select Create Accrual in the Create Accrual window.

8. On the Accruals Setup Page, enter the Pay Type Code (from the accounting system) used to subtract time when it is taken in the Decrementing Pay Types field. For instance, Paid Time Off Taken.
9. For the accrual total balance to display on Pay Stubs, check the box for Is Displayed on Pay Stubs.
10. This set up will allow for Total Accrued, Total Spent and Total Remaining to be displayed on the Employee Record (HR>General>Employee Records>specific employee>Accruals  icon-> may be needed to locate the icon). Here employees or managers can view the accrued time.

Accrual Type	Total Accrued	Total Spent	Total Remaining
#U_VAC) Union Vacation	0.00	0.00	0.00
#REG) Regular	0.00	0.00	0.00

11. Alternatively, employees can view Pay Stubs from PS>General>My Pay Stubs or in the My Records or Remote Payroll mobile apps.

**Notes:**

- This information comes from the Employee Record Pay Table in the accounting system.
- Accruals are only as accurate as the last posting date of payroll in the accounting system. Current time accrued or taken will not display until payroll has been exported to the accounting system.
- The Pay Stub accruals display YTD units for Time Posted to the employee. If employees have rollover time from the prior year, this may cause a differential in balances to display between the PS and HR numbers.

## Classifications

The Classifications List is created to allow HR Managers and Administrators to classify employees by Job Classification throughout the HR system. Classifications and classification skills must be configured. Classifications will display on Employee Records, Jobsite and Crew Dashboards, along with My Records. Classifications display on Workforce Reports and Classification reporting.

**Navigation: HR>Configuration>Classifications.**

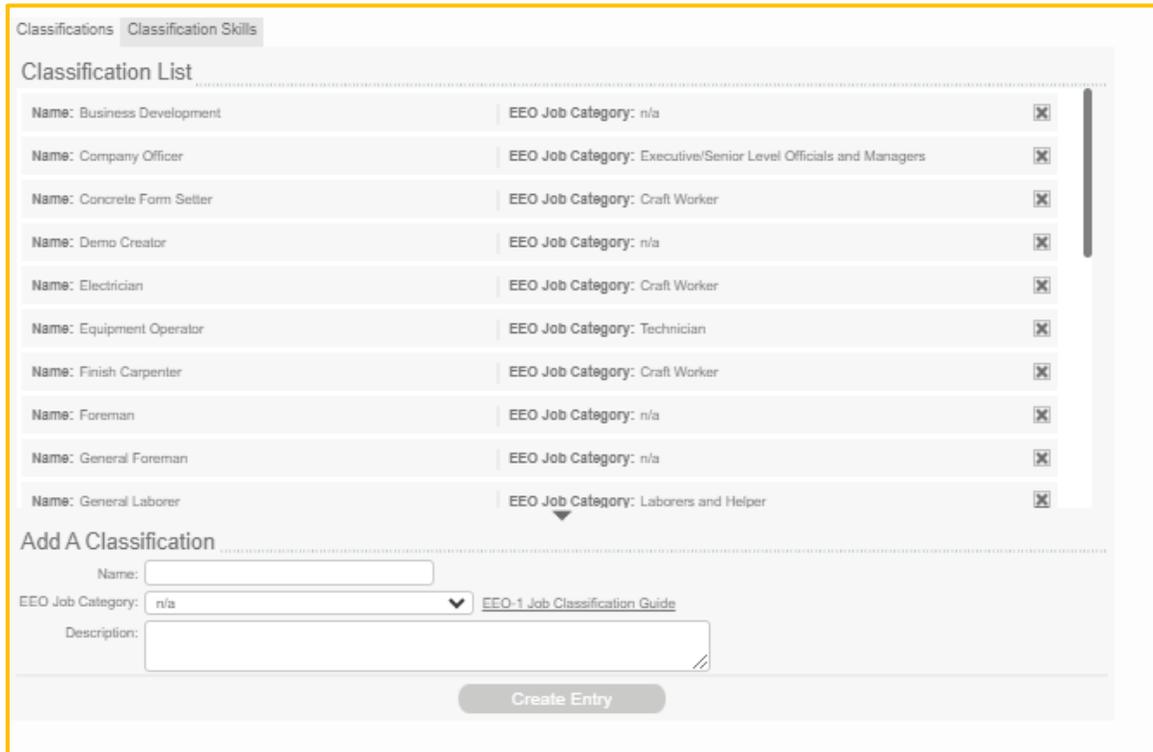
The screenshot displays the 'Classifications' page in a web application. At the top, there are two tabs: 'Classifications' (active) and 'Classification Skills'. Below the tabs is the title 'Classification List'. The main content is a table with two columns: 'Name' and 'EEO Job Category'. Each row represents a classification and includes a small 'X' icon in the right margin, likely for archiving or deleting. Below the table is a section titled 'Add A Classification' which contains a form with three fields: 'Name' (text input), 'EEO Job Category' (dropdown menu), and 'Description' (text area). A 'Create Entry' button is located at the bottom of the form. A link for 'EEO-1 Job Classification Guide' is also visible next to the dropdown menu.

Name	EEO Job Category
Business Development	n/a
Company Officer	Executive/Senior Level Officials and Managers
Concrete Form Setter	Craft Worker
Demo Creator	n/a
Electrician	Craft Worker
Equipment Operator	Technician
Finish Carpenter	Craft Worker
Foreman	n/a
General Foreman	n/a
General Laborer	Laborers and Helper

- Classifications may be added, edited, or deleted (archived). **Note:** Archive is equivalent to a permanent delete.
- The feature provides a link to the EEO-1 Job Classification Guide.
- Classification Skills may be selected from the Picklist for configuration.

## To Add a Classification:

1. Navigate to HR>Configuration>Classifications.



The screenshot shows the 'Classifications' tab in the HR system. It features a 'Classification List' with the following entries:

Name	EEO Job Category	Action
Business Development	n/a	X
Company Officer	Executive/Senior Level Officials and Managers	X
Concrete Form Setter	Craft Worker	X
Demo Creator	n/a	X
Electrician	Craft Worker	X
Equipment Operator	Technician	X
Finish Carpenter	Craft Worker	X
Foreman	n/a	X
General Foreman	n/a	X
General Laborer	Laborers and Helper	X

Below the list is the 'Add A Classification' form with the following fields:

- Name:
- EEO Job Category:  [EEO-1 Job Classification Guide](#)
- Description:
- 

2. Select the Classifications tab.
3. Enter the Name of the classification.
4. Enter the EEO Job Category. To access EEO-1 Classifications, select the link to the U.S. Equal Employment Opportunity Commission.
5. Enter a Description.
6. Select Create Entry.
7. The Classification will automatically display on the list and be available throughout the HR module.

## To Edit a Classification:

1. Select the Classification.
2. The Edit  icon will display.
3. Make the necessary modifications.
4. Select Finished.

### To Set Up Classification Skills:

1. Navigate to HR>Configuration>Classifications.
2. Select the Classification Skills tab.
3. Select the Classification from the Picklist.

Classifications Classification Skills

#### Classification Skills

Classification:  
General Foreman ▼

**General**  
Office Productivity  
Rough Carpentry  
General Carpentry/Framing  
Finish Carpentry  
Welding

**Equipment Operation**  
 Backhoes  
 Cranes  
 Current CDL  
 Dozers  
 Equipment Maintenance  
 Excavators  
 Forklift  
 Loader  
 Rigging  
 Skid steer  
 Connecting

4. Check all appropriate skills for the classification.
5. The Classification Skill will automatically save.

### To Delete a Classification:

1. Navigate to HR>Configuration>Classifications.
2. Select the Classifications tab.
3. Select the X next to the classification.
4. Select Yes. **Note:** Archive is equivalent to a permanent delete.
5. Select Finish.
6. The classification will be removed from the list.

## Certifications

HR Manager/Administrators can set up certifications within the hh2 system. These certifications will display on Employee Records, Jobsite and Crew Dashboards, along with Certification and Employee Pay reporting.

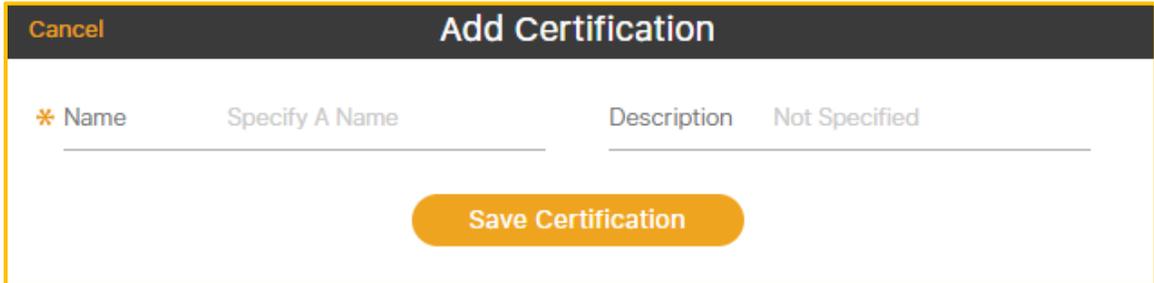
**Navigation: HR>Configuration>Certifications.**

The screenshot displays the 'Certification Setup' interface. At the top, there is a search bar with the placeholder text 'Enter keyword to search' and a dropdown menu currently set to 'Active Certifications'. To the right of the dropdown are icons for deleting (trash) and adding (+) certifications. Below this header, a grid of certification cards is shown. Each card contains a title, a code in a square box, and a brief description. The cards are: Annual Development Training (AD), Backhoe Certification (BC), Blood Test (BT), CDL License (CL), CPR & FIRST AID (CF), Crane Certification (CC), Employee Sensitivity Training (ES), Fall Protection (FP), Forklift Certification (FC), Ladder Safety Meeting (LS), OSHA 30 (O), OSHA10 (OS), and Tool Box Training 7-31-2014 (TB).

- Certifications may be searched by key word using the Search field.
- Certifications information may be sorted Active, Inactive or All Certifications.
- Certifications may be added, edited, or deleted.

### To Add a Certification:

1. Navigate to HR>Configuration>Certifications.
2. Select the Add  icon.



Cancel Add Certification

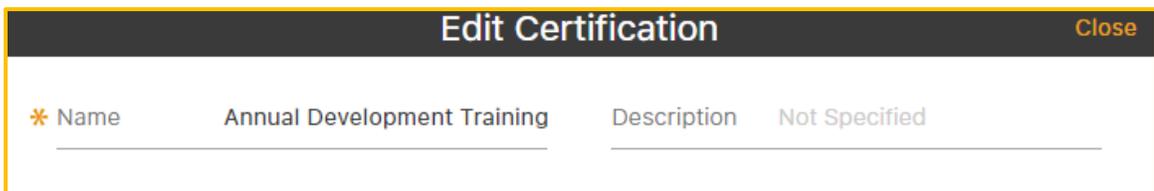
\* Name Specify A Name Description Not Specified

Save Certification

3. Enter the Name of the certification.
4. Enter a Description (required).
5. Select Save Certification.
6. The certification will display on the list and be available for use.

### To Edit a Certification:

1. Navigate to HR>Configuration>Certifications.
2. Click on the Certification.



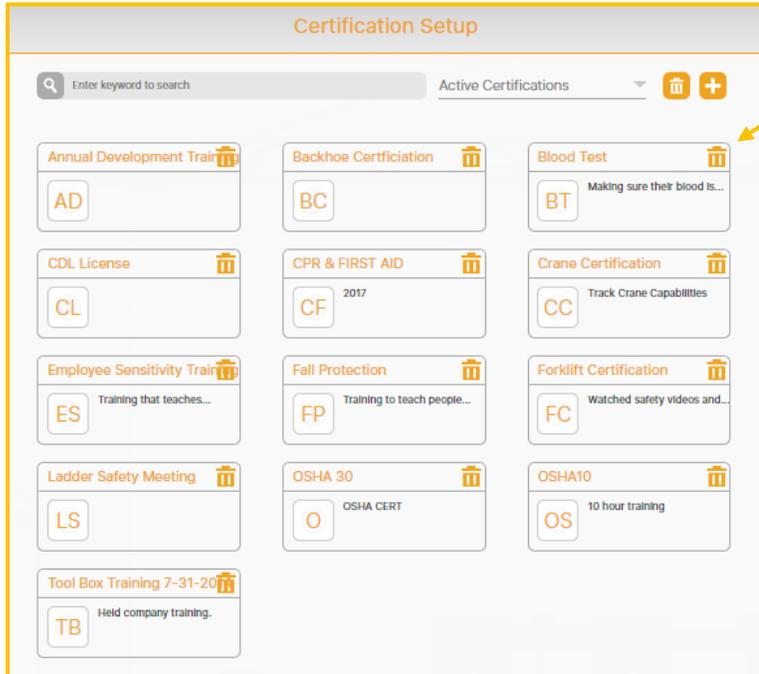
Edit Certification Close

\* Name Annual Development Training Description Not Specified

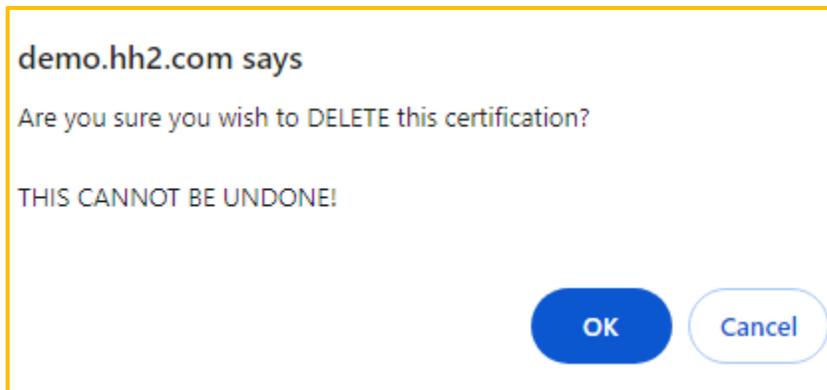
3. Make the necessary modifications.
4. Select Close.

### To Delete Certifications:

1. Navigate to HR>Configuration>Certifications.
2. Select the Delete  icon.



3. Delete icons will now display next to all Certifications.
4. Select the Delete  icon next to the Certification(s) to delete.



5. Confirm the deletion by selecting Ok.
6. Select the Delete  icon to exit the delete mode.
7. The Certification(s) will be removed from the Certifications Master List.

## Skills Matrix

The Skills Matrix allows the HR Administrator the ability to set up skills matrices that tie to the Evaluations tab on the Employee Record, Jobsite Dashboard, and the Crew Dashboard. Furthermore, Skills appear on Classifications and Locations reporting.

**Navigation: HR>Configuration>Skills Matrix.**

The screenshot displays the 'Setup Skills Matrix' interface. At the top, there is a 'Skill Set' dropdown menu currently set to '[Top]'. Below this is a table listing various skills. Each row contains the skill name, whether it is rated, and a description, with a delete icon (X) in the rightmost column.

Name	Rated	Description	Action
Carpenters	No	Testing Carpenters	X
Framing	Yes	How good are they	X
General Forum Skills	No	none	X
Office Skills	No	none	X
Painting	Yes	How good are they	X
x	Yes	x	X
General	No	none	X
Office Productivity	No	none	X
Rough Carpentry	No	none	X

Below the table is an 'Add A Skill' section with the following fields:

- Name:
- Is Rated:
- Description:

A 'Create Entry' button is located at the bottom of the form.

- Skill may be searched by the Picklist dropdown in the Skill Set field.
- Skills may be added, edited, or deleted.

## To Add a Skill:

1. Navigate to HR>Configuration>Skills Matrix.

The screenshot displays the 'Setup Skills Matrix' interface. At the top, there is a dropdown menu for 'Skill Set' currently set to '[Top]'. Below this is a table listing existing skills:

Name	Rated	Description	Action
Carpenters	No	Testing Carpenters	X
Framing	Yes	How good are they	X
General Forum Skills	No	none	X
Office Skills	No	none	X
Painting	Yes	How good are they	X
General	No	none	X
Office Productivity	No	none	X
Rough Carpentry	No	none	X
General Carpentry/Framing	No	none	X

Below the table is an 'Add A Skill' section with the following fields:

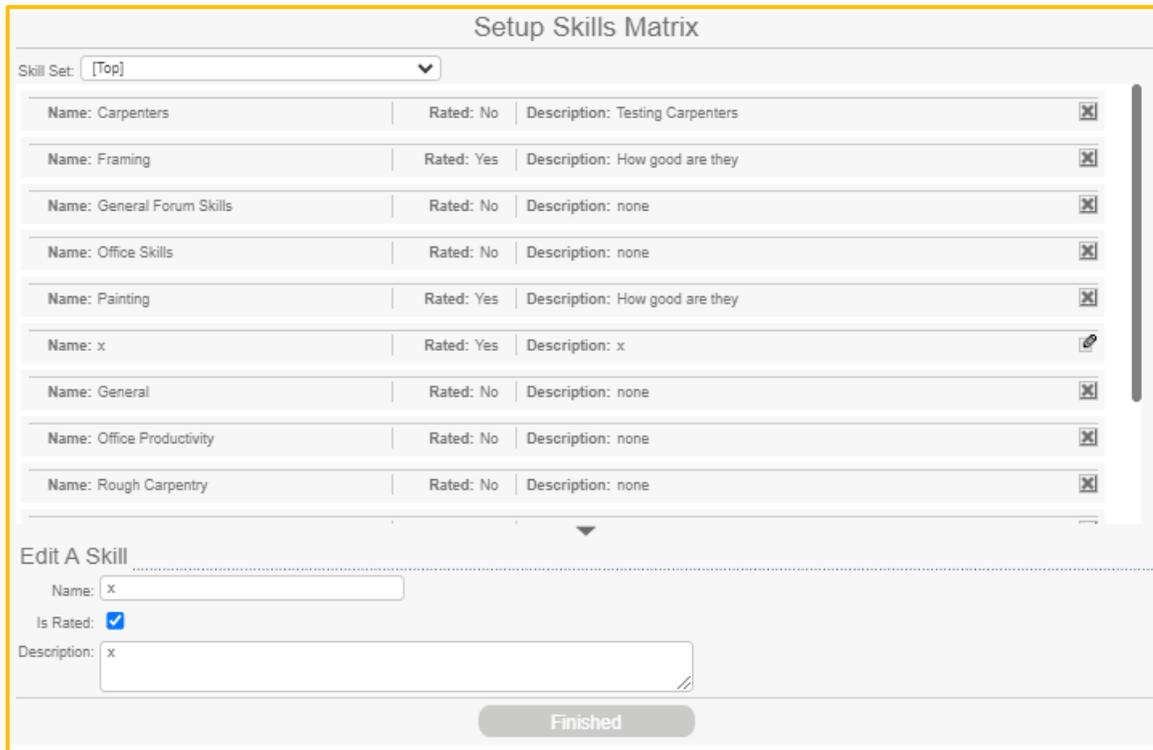
- Name:
- Is Rated:
- Description:

A 'Create Entry' button is located at the bottom of the form.

2. Enter the Name of the skill.
3. Check the Is Rated box if the skill is Rated. This will provide the ratings scale on the Employee Record and Job and Crew Dashboards.
4. Enter a Description.
5. Select Create Entry.
6. Select Refresh.
7. The Skill will display on the list and be available throughout the HR module for use.

### To Edit a Skill:

1. Navigate to HR>Configuration>Skills Matrix.
2. Select the Skill with a click.



The screenshot displays the 'Setup Skills Matrix' interface. At the top, there is a dropdown menu for 'Skill Set' with '[Top]' selected. Below this is a table of skills:

Name	Rated	Description	Action
Carpenters	No	Testing Carpenters	X
Framing	Yes	How good are they	X
General Forum Skills	No	none	X
Office Skills	No	none	X
Painting	Yes	How good are they	X
x	Yes	x	Edit
General	No	none	X
Office Productivity	No	none	X
Rough Carpentry	No	none	X

Below the table is the 'Edit A Skill' form:

Name: x  
Is Rated:   
Description: x

At the bottom of the form is a 'Finished' button.

3. The Edit  icon will display.
4. Make the necessary modifications.
5. Select Finished.

### To Delete a Skill:

1. Navigate to HR>Configuration>Skill Matrix.
2. Select the X next to the skill.
3. Select Yes to confirm. **Note:** Archive is equivalent to Delete and will permanently delete the Skill Matrix.
4. The skill will be removed from the list.

## Locations

A list of job locations is pulled from the accounting system and the HR Administrator has the opportunity to pull them into the hh2 system. Locations are used in the Employee Record to provide job locations where the employee works or has worked. This information can later be pulled into Location reports (HR>Enterprise>Locations) that display in either PDF or Excel format.

**Navigation: HR>Configuration>Locations.**

HR Locations

Available Company Locations  
[All] ABCDEFGHIJKLMNOPQRSTUVWXYZ

Company Locations Used In HR  
[All] A C

AAA Insurance & Bonding - Branch3  
AAA Insurance & Bonding - Corporate Office  
Acme Door & Glass Distributors - Branch1  
Acme Door & Glass Distributors - Branch2  
Acme Door & Glass Distributors - Branch3  
Acme Door & Glass Distributors - Branch4  
Acme Door & Glass Distributors - Branch5  
Adams Electric - Branch1  
Adams Electric - Corporate Office  
ALLState University  
Alpha Insulation - Branch1  
Alpha Insulation - Branch2  
Alpha Insulation - Branch3  
Alpha Insulation - Corporate Office  
B & M Marble, Inc. - Branch1  
B & M Marble, Inc. - Branch2  
B & M Marble, Inc. - Branch3  
B & M Marble, Inc. - Corporate Office  
Barth Electric - Branch1  
Barth Electric - Branch2  
Barth Electric - Branch3  
Barth Electric - Corporate Office  
Beaverton Painting - Branch1  
Beaverton Painting - Branch2  
Beaverton Painting - Branch3  
Beaverton Painting - Corporate Office  
Beaverton Sand & Gravel - Branch1  
Beaverton Sand & Gravel - Branch2  
Beaverton Sand & Gravel - Branch3  
Beaverton Sand & Gravel - Corporate Office  
Beaverton; City of - Branch1  
Beaverton; City of - Branch2

Enter Keyword to Search

AAA Insurance & Bonding - Branch1  
AAA Insurance & Bonding - Branch2  
Acme Door & Glass Distributors - Corporate Office  
Corporate Office

Enter Keyword to Search

- Locations may be searched by key word or the starting letter of the location.
- Locations may be added to or removed for use within the HR module.

**To Add a Location(s):**

1. Navigate to HR>Configuration>Locations.
2. Select the Location(s) in the left-hand column with a click.
3. Select > to move one or more of the Locations. Select >> to move all Locations.
4. This will move the Location(s) to the right-hand column and into the HR system.

**To Remove a Location(s) from hh2:**

1. Navigate to HR>Configuration>Locations.
2. Select the Location(s) in the right-hand column.
3. Select < to move one or more of the Location(s). Select << to move all Locations.
4. This will move the Location(s) to the left-hand column and out of the hh2 system.

## Crews

The setup of Crews allows the Administrator to create, name, describe and add crew managers to crews. After Crews are set up, they are utilized in the Crew Dashboard (HR>General>Crew Dashboard). Crews appear on Locations reporting as well.

**Navigation: HR>Configuration>Crews.**

The screenshot displays the 'Setup Crews' interface. At the top, there is a title 'Setup Crews'. Below it, a list of crews is shown, each with a name and a delete icon (X):

- Name: Concrete Crew
- Name: Earthwork Crew
- Name: Jason Morrison's Crew
- Name: JayMorr
- Name: John Doe
- Name: Painter
- Name: Pili Crew

Below the list is a section titled 'Add A Crew' with input fields for 'Name:' and 'Description:'. Underneath is the 'Crew Managers' section, which includes a list of users on the left, a search box, and a right-hand box for selecting managers. The list of users includes: Admin, Admin; Baker, Brent; Banks, Amanda; Bass, Jake; Beaman, Blake; Blosser, Megan; Butts, Cemore; Case, Backhoe; Cox, Dallen; Cranford, Aaron; Cruiseshin, Tom. The right-hand box contains the text 'There are no users selected.' and a search box. At the bottom, there is a 'Create Entry' button.

- Crews may be added, edited, or deleted.

## To Add a Crew:

1. Navigate to HR>Configuration>Crews.

The screenshot displays the 'Setup Crews' interface. At the top, there is a list of existing crews, each with a name and a delete icon (X). The crews listed are: Concrete Crew, Earthwork Crew, Jason Morrison's Crew, JayMorr, John Doe, Painter, and Pili Crew. Below this list is a section titled 'Add A Crew' with input fields for 'Name' and 'Description'. Underneath is the 'Crew Managers' section, which includes a list of users (Admin, Admin; Baker, Brent; Banks, Amanda; Bass, Jake; Beaman, Blake; Blosser, Megan; Butts, Camore; Case, Backhoe; Cox, Dallen; Cranford, Aaron; Cruickshin, Tom) and a search box. Navigation buttons (>>, >, <, <<) are positioned between the user list and a right-hand box that currently says 'There are no users selected.' A 'Create Entry' button is located at the bottom of the interface.

2. Enter the Name of the crew.
3. Enter a Description.
4. Select the Crew Manager(s) from the left-hand column with a click. Crew Managers may be searched by key word or the starting letter of the last name.
5. Select >> to add all Crew Managers or > to add those selected.
6. Select Create Entry.
7. The Crew with the associated crew managers will display on the list and be available on the Crew Dashboard.

## To Edit a Crew:

1. Select the Crew with a click.

The screenshot shows the 'Setup Crews' interface. At the top, there is a list of crews with their names and an edit icon (pencil) next to 'Concrete Crew'. Below this is the 'Edit A Crew' section, which has fields for 'Name' and 'Description', both containing 'Concrete Crew'. Underneath is the 'Crew Managers' section, which is divided into two columns: 'Web Services Users' and 'Crew Managers'. The 'Web Services Users' list contains names like Banks, Amanda; Bass, Jake; Beaman, Blake; Blosser, Megan; Butts, Camore; Case, Backhoe; Cox, Dallen; Cranford, Aaron; Cruiseship, Tom; Damon, Brent; and Dean, Jim. The 'Crew Managers' list contains Admin, Admin; Baker, Brent; and Welle, Curtis. There are navigation arrows between the lists and search boxes for each. A 'Finished' button is at the bottom.

2. The Edit  icon will display.
3. Make the necessary modifications.
4. Select Finished.

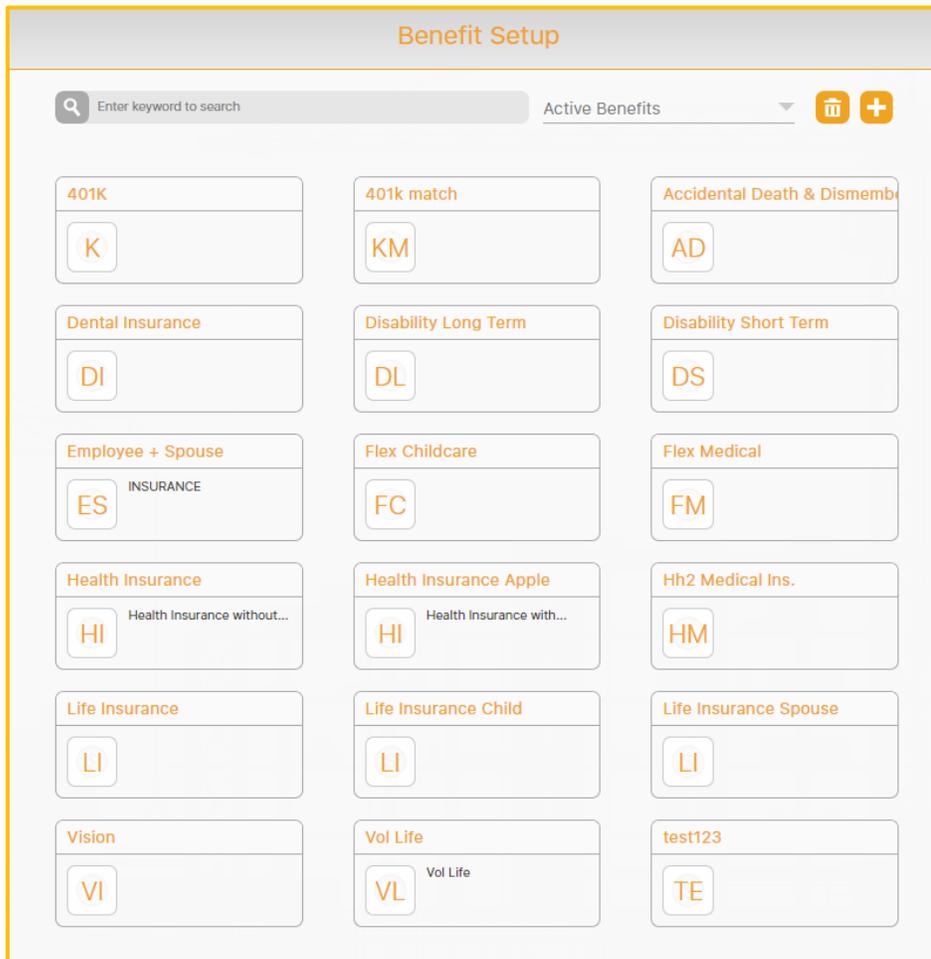
## To Delete a Crew:

1. Navigate to HR>Configuration>Crews.
2. Select the X next to the crew.
3. Select Yes to confirm. **Note:** Archive is equivalent to Delete and will permanently delete the Crew.
4. The Crew will be removed from the list.

## Benefits

Benefit configuration will allow the HR Administrator to set up benefits, benefits rates, fringes, deductions, and eligibility. Once benefits are set up, benefit information can be found in the Employee Record and reported on via Benefit Enrollment and Benefit Eligibility reporting.

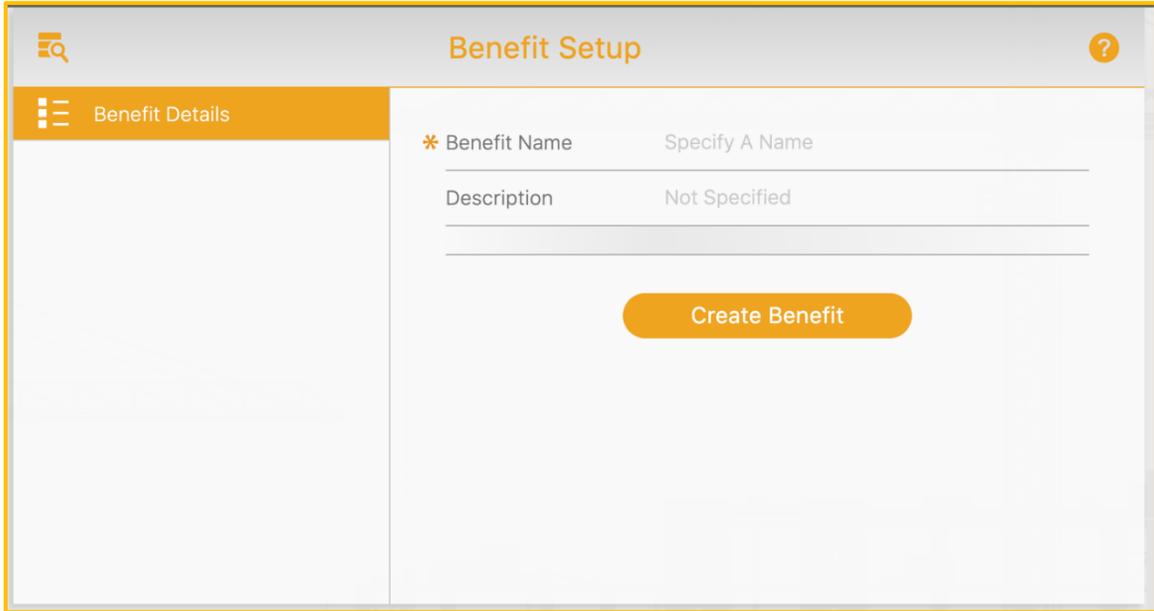
**Navigation: HR>Configuration>Benefits.**



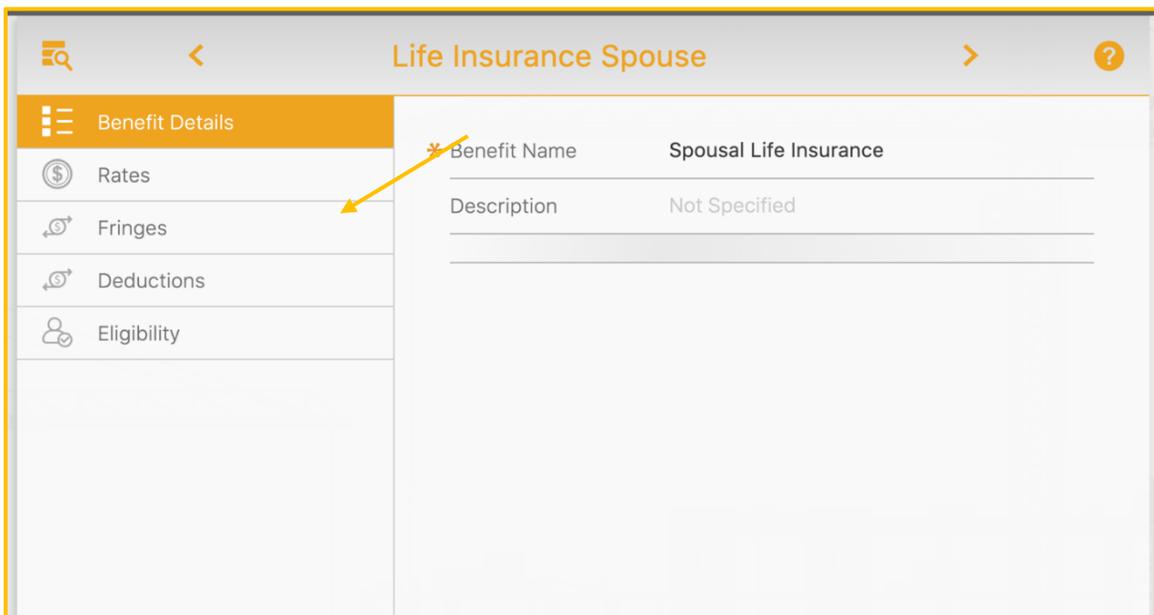
- Benefits may be searched by key word using the Search field.
- Benefit information may be sorted Active, Inactive or All Benefits.
- Benefits may be added, edited, or deleted.
- Rates, Fringes, Deductions and Eligibility may be added to benefits.

**To Add a Benefit:**

1. Navigate to HR>Configuration>Benefits.
2. Select the Add  icon.

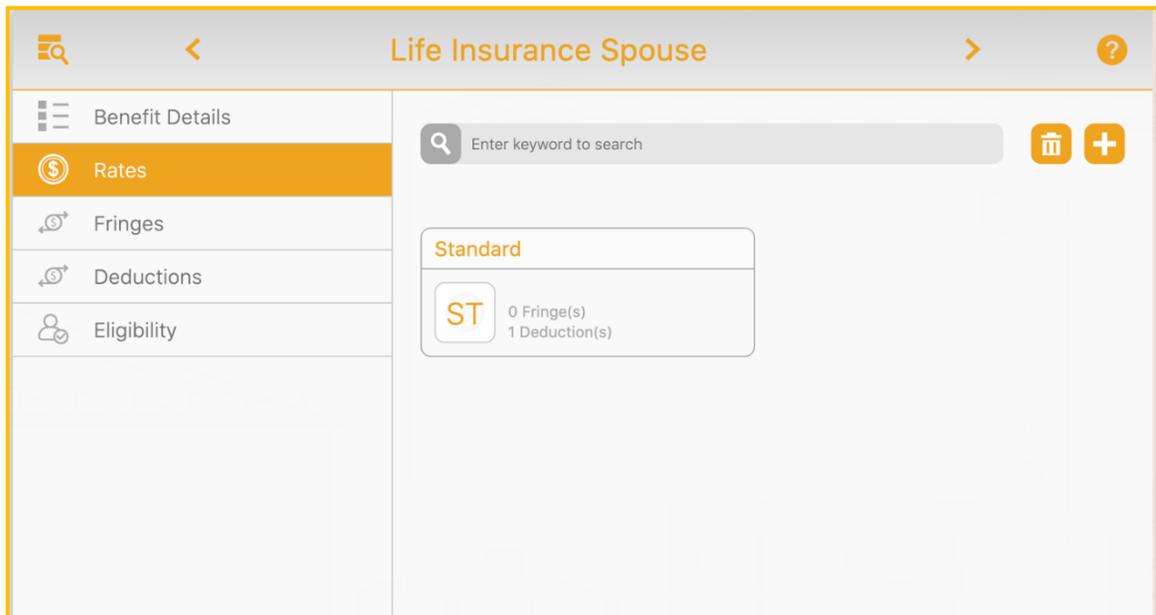


3. Enter the Benefit Name.
4. Enter a Description (optional).
5. Select Create Benefit.
6. Other tabs will be displayed once the benefit is created. Set up the tabs that follow.

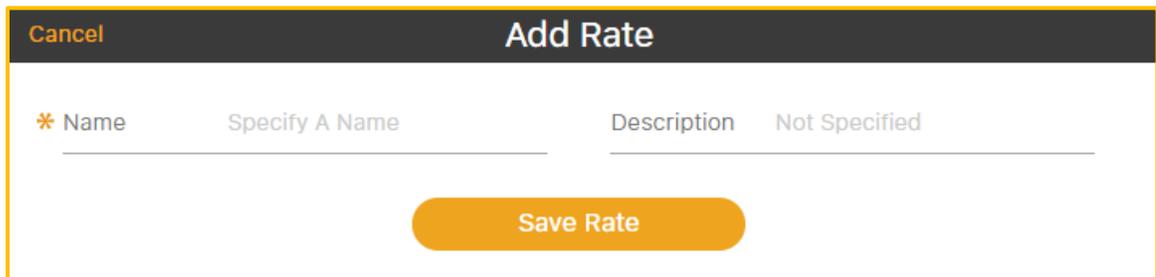


## To Set Up Benefit Rates:

1. Select the Rates tab.



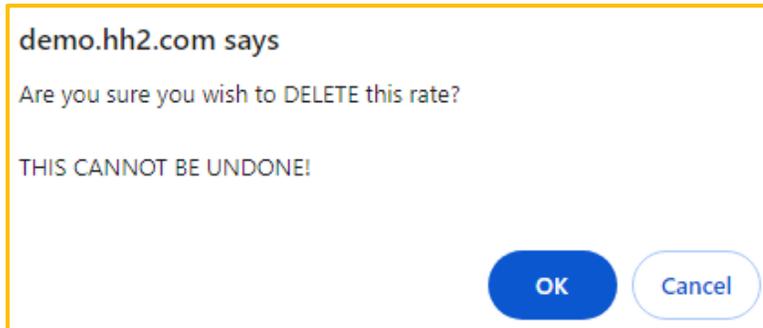
2. Existing Rates may be searched by keyword.
3. Select the Add  icon to add a new Rate.

A screenshot of a mobile application dialog box titled "Add Rate". The dialog has a dark header bar with "Cancel" on the left and "Add Rate" in the center. Below the header, there are two input fields. The first field is labeled "\* Name" and has a placeholder "Specify A Name". The second field is labeled "Description" and has a placeholder "Not Specified". At the bottom center of the dialog is a large orange button labeled "Save Rate".

4. Enter the Rate Name.
5. Enter a Description.
6. Select Save Rate.
7. The Rate will now be displayed when the Rates tab is selected.

### To Delete a Benefit Rate:

1. Select the Delete  icon.
2. Select the Delete  icon next to the Rate to delete.



3. Select OK.
4. Select Delete  icon to exit delete mode.

## To Set Up Benefit Fringes:

1. Select the Fringes tab.

The screenshot shows the 'Life Insurance Spouse' interface. On the left, a sidebar contains navigation options: 'Benefit Details', 'Rates', 'Fringes' (highlighted in orange), 'Deductions', and 'Eligibility'. The main content area has a search bar with the placeholder 'Enter keyword to search', a dropdown menu set to 'All Rates', and a '+ Add' icon. Below these elements, a message states 'There are no fringes specified'.

2. Existing Fringes may be searched by keyword.
3. Select the Add **+** icon to add a new Fringe.

The 'Add Rate Fringe' dialog box is shown with the following fields and options:

- Rate:** No Rates Created
- Standard:** Select a Standard Fringe
- Amount:** 0.00
- Limit:** 0.00
- Limit Period:** No Period
- Formula:** Not Specified
- Is Automatic:**  Yes
- Is Active:**  Yes
- Frequency:** Weekly
- Calc. Method:** Default
- Custom Fields:**  Amount,  Formula,  Limit,  Calc. Method,  Frequency,  Period

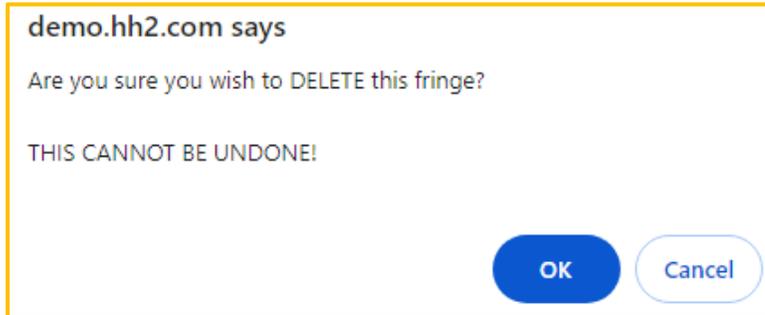
A 'Save Fringe' button is located at the bottom center of the dialog.

4. Select Fringe Rate from the Rate Picklist.
5. Use the Magnifying  icon and then select a Standard Fringe.
6. Enter an amount of the fringe in the Amount field.
7. Enter the limit amount of the fringe amount for a specified time period in the Limit field. The fringe will stop once this limit has been met.
8. Select the Limit Period from the Picklist. This is the measurement for the period of the limit. Most users select by pay check (Check) or calendar year (Year to Date). However, other Limit Periods are available.
9. Select a Formula, if applicable. This is used in the Sage accounting system to map a fringe or deduction to a formula in Sage.
10. Check Is Automatic, if automatic.
11. Check Is Active to make the fringe active.
12. Select the Frequency from the Picklist.
13. Select the Calculation Method from the Picklist. This field is related specifically to the Sage accounting system. When any Pay Type is set up (including those related to fringes and deductions), the Sage accounting system requires a calculation method to determine how the Pay Type will be calculated.
14. For the Custom Fields boxes, check any fields in which the data can be customized for individual employees. Leaving the fields unchecked will make it so the set configuration within the fringe setup cannot be altered for individual employees.  
**Use Case:** One employee has a higher fringe for health care costs than the other employees. The Amount box in the Custom Field boxes, can be checked. This will allow the amount for that individual employee to be updated on their employee record. These boxes are typically used in one-off scenarios.
15. Select Save Fringe.
16. The fringe will be displayed in Fringes tab.

**Note:** Benefits including the associated Fringe may be synchronized from hh2 back into the accounting system. This is dependent on the accounting system utilized.

### To Delete a Benefit Fringe:

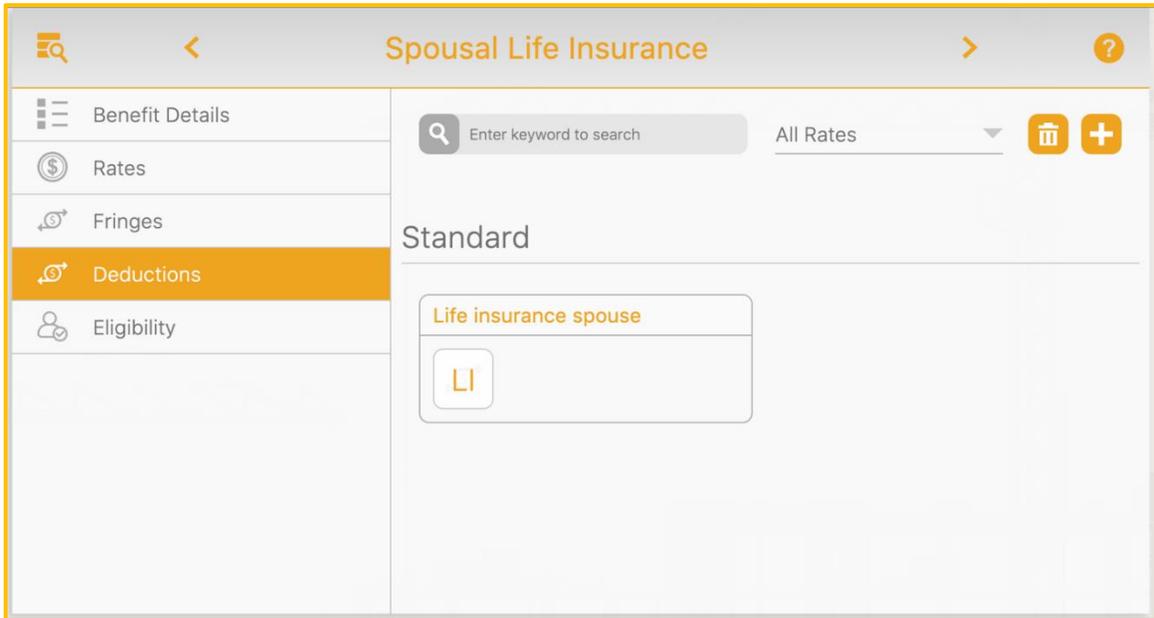
1. Select the Delete  icon.
2. Select the Delete  icon next to the Fringe to delete.



3. Select OK.
4. Select Delete  icon to exit delete mode.

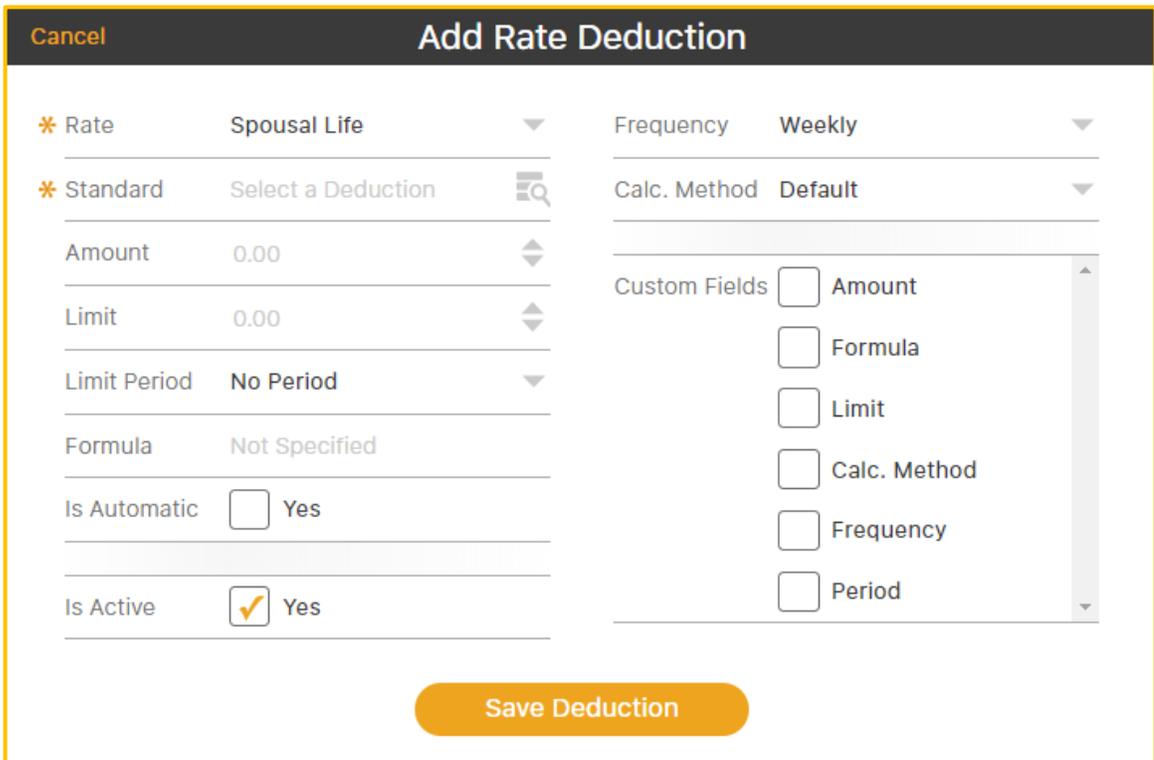
## To Set Up Benefit Deductions:

1. Select the Deductions tab.



The screenshot shows the 'Spousal Life Insurance' screen with the 'Deductions' tab selected. The left sidebar contains a menu with 'Benefit Details', 'Rates', 'Fringes', 'Deductions' (highlighted), and 'Eligibility'. The main content area has a search bar with the placeholder 'Enter keyword to search', a dropdown menu set to 'All Rates', and a trash icon and an add icon. Below the search bar, the word 'Standard' is displayed. A card titled 'Life insurance spouse' contains a button labeled 'LI'. At the bottom right of the main area, there is a trash icon and an add icon.

2. Existing Deductions may be searched by keyword.
3. Select the Add  icon to add a new Deduction.

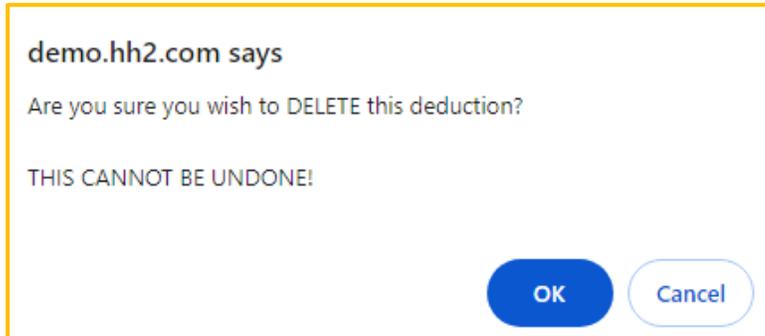


The screenshot shows the 'Add Rate Deduction' form. The title bar is 'Add Rate Deduction' with a 'Cancel' button on the left. The form is divided into two columns. The left column contains: '\* Rate' (Spousal Life), '\* Standard' (Select a Deduction), 'Amount' (0.00), 'Limit' (0.00), 'Limit Period' (No Period), 'Formula' (Not Specified), 'Is Automatic' (Yes), and 'Is Active' (Yes). The right column contains: 'Frequency' (Weekly), 'Calc. Method' (Default), and a 'Custom Fields' list with checkboxes for 'Amount', 'Formula', 'Limit', 'Calc. Method', 'Frequency', and 'Period'. A 'Save Deduction' button is at the bottom.

4. Select a Rate from the Rate Picklist.
5. Use the Magnifying  icon and then select a Standard Deduction.
6. Enter an amount of the deduction in the Amount field.
7. Enter the limit amount of the deduction for a specified time period in the Limit field. The deduction will stop once this limit has been met.
8. Select the Limit Period from the Picklist. This is the measurement for the period of the limit. Most users select by pay check (Check) or calendar year (Year to Date). However, other Limit Periods are available.
9. Select a Formula, if applicable. This is used in the Sage accounting system to map a deduction to a formula in Sage.
10. Check Is Automatic, if automatic.
11. Check Is Active to make the deduction active.
12. Select the Frequency from the Picklist.
13. Select the Calculation Method from the Picklist. This field is related specifically to the Sage accounting system. When any Pay Type is set up (including those related to fringes and deductions), the Sage accounting system requires a calculation method to determine how the Pay Type will be calculated.
14. For the Custom Fields boxes, check any fields in which the data can be customized for individual employees. Leaving the fields unchecked will make it so the set configuration within the deduction setup cannot be altered for individual employees. **Use Case:** One employee has a lower deduction for health care costs than the other employees. The Amount box in the Custom Field boxes, can be checked. This will allow the amount for that individual employee to be updated on their employee record. These boxes are typically used in one-off scenarios.
15. Select Save Deduction.
16. The Deduction will be displayed in Deductions tab.

### To Delete a Benefit Deduction:

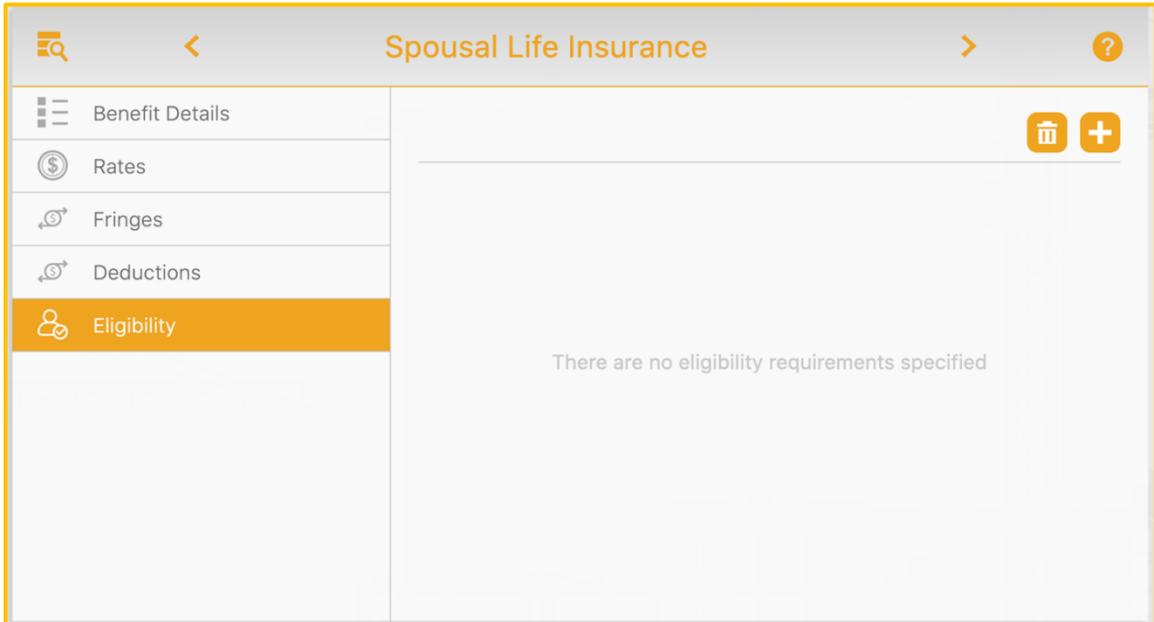
1. Select the Delete  icon.
2. Select the Delete  icon next to the Deduction to delete.



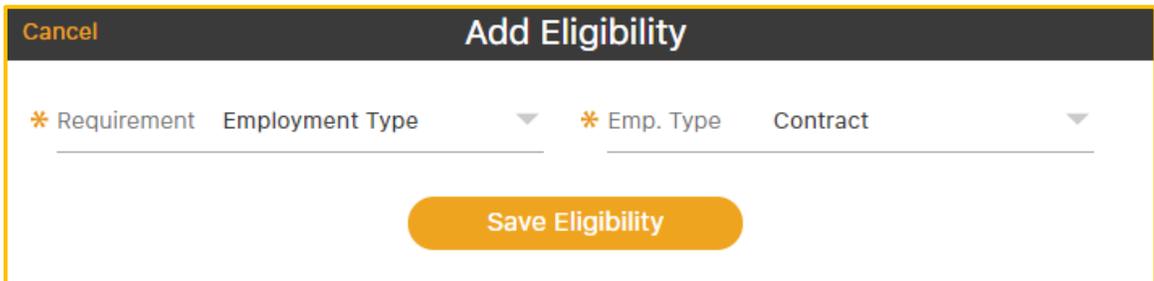
3. Select OK.
4. Select Delete  icon to exit delete mode.

### To Set Up Benefit Eligibility:

1. Select the Eligibility tab.



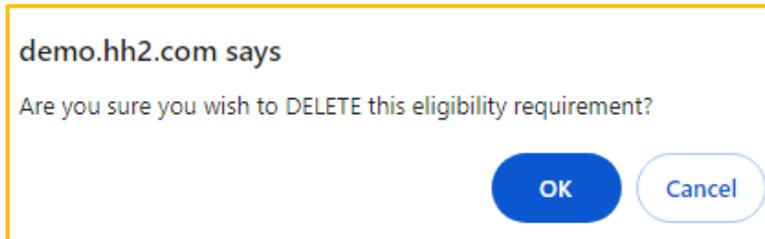
2. Existing Eligibilities may be searched by keyword.
3. Select the Add  icon to add a new Eligibility.



4. Select the Requirement for the Eligibility from the Picklist.
5. Select the Employment Type from the Picklist.
6. Select Save Eligibility.

### To Delete a Benefit Eligibility:

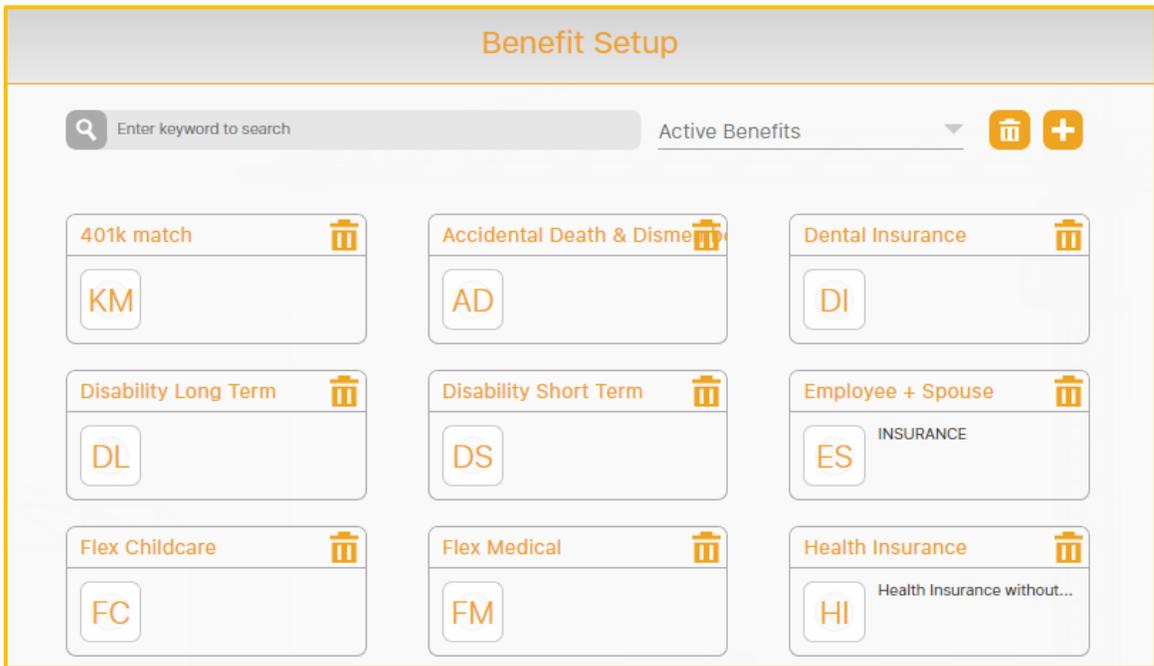
1. Select the Delete  icon.
2. Select the Delete  icon next to the Eligibility to delete.



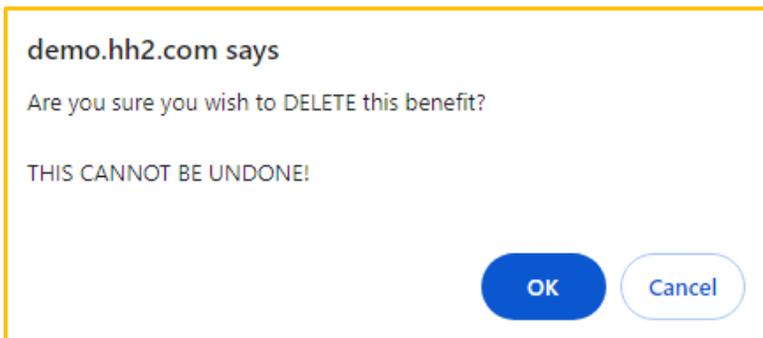
3. Select OK.
4. Select Delete  icon to exit delete mode.

## To Delete a Benefit in Its Entirety:

1. Navigate to HR>Configuration>Benefits.



2. Select the Delete  icon.
3. Delete  icons will display next to each benefit.
4. Select the Delete  icon next to each Benefit to delete.

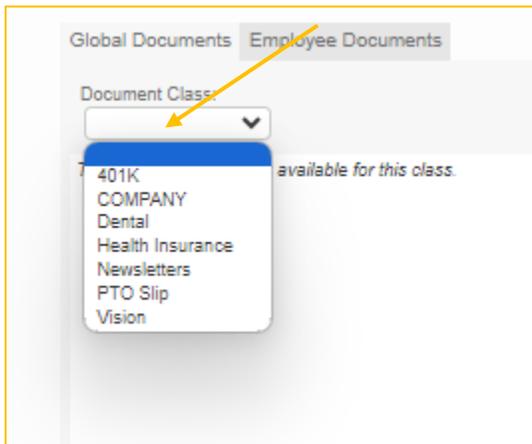


5. Select OK.
6. Select Delete  icon to exit delete mode.

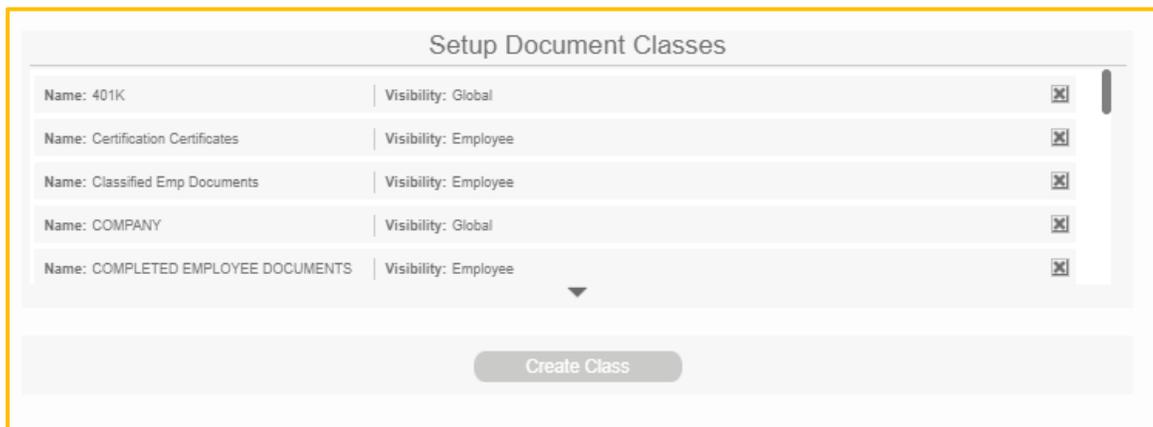
## Document Classes

Document Classes categorize available document types, appearing on Employee Records and Job/Crew Dashboards. This setup influences the Document Class Picklist on the Document Library (HR>General>Document Library) and determines the Document Classes displayed on the Employee Record and Job/Crew Dashboards.

This configuration will impact available choices in this Picklist. HR>General>Document Library>Global or Employee Documents:



**Navigation: HR>Configuration>Document Classes.**



- Document Classes may be added, edited, or deleted.

## To Add a Document Class:

1. Navigate to HR>Configuration>Document Class.
2. Select Create Class.

The screenshot displays the 'Setup Document Classes' interface. At the top, there is a table listing existing document classes:

Name	Visibility	Action
401(k)	Global	✕
Dental	Employee	✕
Employee Class	Employee	✕
Medical	Global	✕
Vision	Global	✕

Below the table is the 'Class Info' section, which includes a heading 'Add A Document Class' and the following form fields:

- Name:
- Description:
- Visibility:  Global  Employee
- Notifications:

A 'Create Class' button is located at the bottom of the form.

3. Enter the Name of the Document Class.
4. Select Global (this indicates that the Document Class will be available company-wide), or select Employee (this indicates that the document will be available on an individual employee basis).
5. For Global Documents, an HR Administrator can optionally enter an email address in the Notifications field. When a new document is added to this particular Global Document Class via the Document Library (HR > General > Document Library), a notification will be sent to the email address. The email will include an attached link to the newly created document.
6. Enter a Description (optional).
7. Select Create Class.
8. Two additional tabs display. They are Custom Fields and Available Locations tabs.

## Custom and Available Locations Fields

Custom Fields allow the Administrator to set up custom fields for Employee Documents (not Global Documents). These fields may be utilized to store additional information, as needed by the construction company.

The Available Locations feature determines which Security Groups (HR>Configuration>Security Groups) may access the available Document Class. Only the employees listed in the Security Group will be permitted to utilize the Document Class. From there, Administrators may grant employees within that Security Group access to add additional documents (Write) within that Document Class for their own records, or grant them the permission to only view (Read) records added to their Document Class by Administrators. This access is granted through the My Records field on the Setup Document Class Page (HR>Configuration>Document Class>Setup Document Classes Page>Available Locations tab>My Records field). See [To Add Available Locations](#).

**Note:** HR Administrators will always be able to view/add Documents to any accessible class for the employee regardless of the permissions set.

## To Add a Custom Field:

1. Navigate to HR>Configuration>Document Class>Custom Fields tab.

The screenshot displays the 'Setup Document Classes' interface. At the top, there is a title bar 'Setup Document Classes'. Below it is a table listing document classes with columns for 'Name' and 'Visibility'. The table contains the following entries:

Name	Visibility
	Global
401K	Global
Certification Certificates	Employee
Classified Emp Documents	Employee
COMPANY	Global
COMPLETED EMPLOYEE DOCUMENTS	Employee
Dental	Global
Disciplinary Employee File	Employee

Below the table, there are tabs for 'Class Info', 'Custom Fields', and 'Available Locations'. The 'Custom Fields' tab is active, showing a list of custom fields. One field is visible:

Name	Description
Custom Field for Administrator Preference	to meet business needs

At the bottom of the 'Custom Fields' section, there is a section titled 'Add A Custom Field' with input fields for 'Name' and 'Description', and a 'Create Field' button.

2. Select Create Field near the bottom of the page.
3. Add a Name and a Description (optional).
4. Select Create Field once more to submit the creation.

## To Add Available Locations:

1. Navigate to HR>Configuration>Document Class>Available Locations tab.

The screenshot shows the 'Setup Document Classes' interface. At the top, there is a table listing document classes and their visibility settings:

Name	Visibility	Action
Name:	Global	[X]
Name: 401K	Global	[X]
Name: Certification Certificates	Employee	[X]
Name: Classified Emp Documents	Employee	[X]
Name: COMPANY	Global	[X]
Name: COMPLETED EMPLOYEE DOCUMENTS	Employee	[X]
Name: Dental	Global	[X]
Name: Disciplinary Employee File	Employee	[X]

Below the table, there are tabs for 'Class Info', 'Custom Fields', and 'Available Locations'. The 'Available Locations' tab is selected. Under this tab, there is a section for 'Class Locations' with a table showing settings for 'Employee Group', 'My Records', and 'Job/Crew Dashboards'. At the bottom, there is a form to 'Add A Class Location' with dropdown menus for 'Employee Group', 'My Records', and 'Job/Crew Dashboard', and a 'Create Field' button.

2. Select Create Field near the bottom of the page.
3. Add a Name and a Description (optional).
4. Select Create Field once more to submit the creation.
5. Select the Security Group from the Employee Group field.
6. Select if employees in that Security Group may view (Read-only), Write (add additional information to the Document Class) or not have the Document Class available (Unavailable). The same holds true for the Job/Crew Dashboard field when working with the Job and Crew Dashboards.

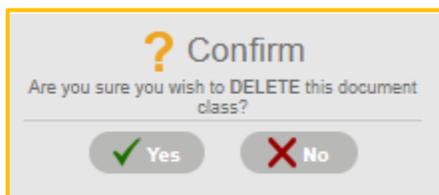
Once Document Classes are set up, along with any necessary Custom Fields and Available Locations, the user may edit or delete a Document Class.

**To Edit a Document Class:**

1. Navigate to HR>Configuration>Document Classes.
2. Click the Document Class to be edited.
3. Make the necessary changes.
4. Select Finished.

**To Delete a Document Class:**

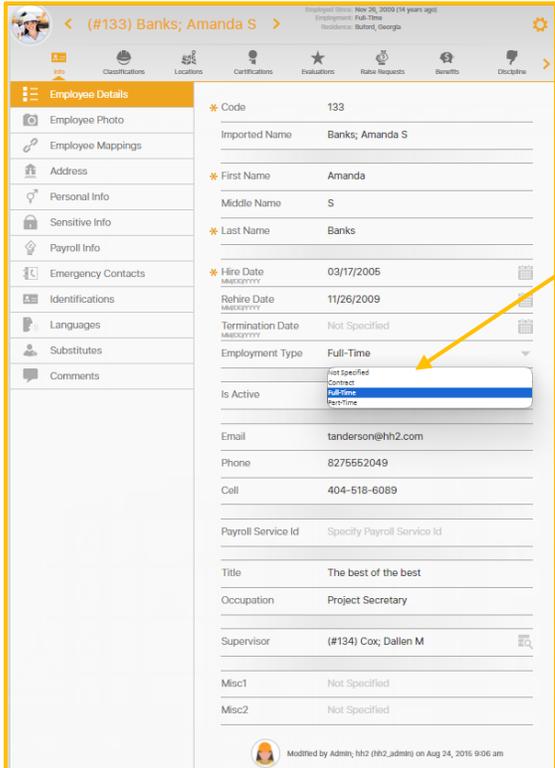
1. Navigate to HR>Configuration>Document Class.
2. Select the Document Class to delete.
3. Select the X next to the Document Class.



4. Select Yes.
5. The Document Class will no longer be displayed in the Picklist in the Document Class field in the Document Library and will be removed from the Setup Document Classes Page.

## Type Lists

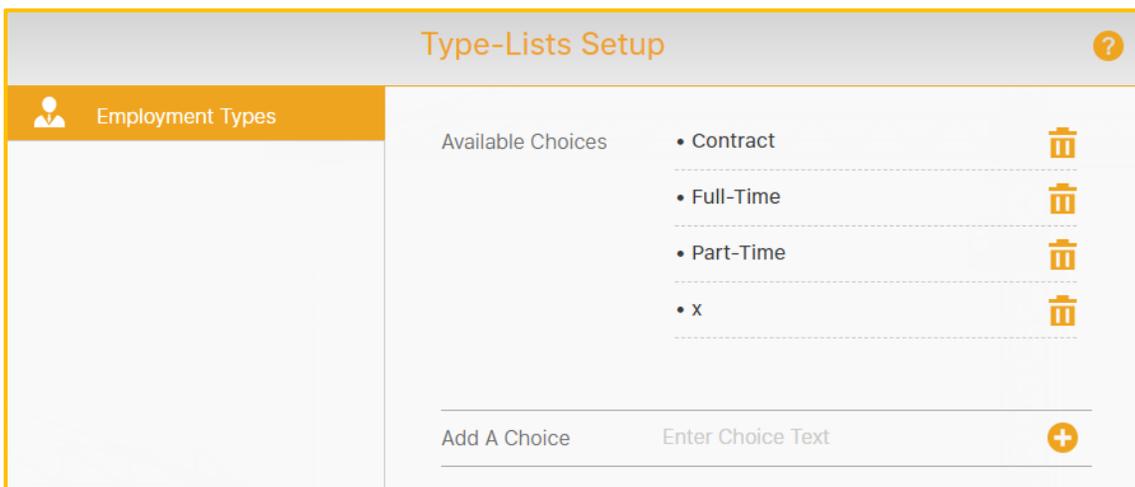
Type Lists reflect the type of employment the construction company offers, such as Full-Time, Part-Time or Contract work. The Type Lists impacts which options display in the Picklist in the Employment Type field on the Employee Record (HR>Employee Record>Employee Details tab). The Employment Type field is displayed below:



The screenshot shows the 'Employee Details' form for Amanda S. Banks. The 'Employment Type' field is set to 'Full-Time'. A dropdown menu is open, showing options: 'Not Specified', 'Contract', 'Full-Time', and 'Part-Time'. A yellow arrow points to the 'Full-Time' option in the dropdown.

* Code	133
Imported Name	Banks; Amanda S
* First Name	Amanda
Middle Name	S
* Last Name	Banks
* Hire Date	03/17/2005
Rehire Date	11/26/2009
Termination Date	Not Specified
Employment Type	Full-Time
Is Active	Not Specified
Email	tanderson@hh2.com
Phone	8275552049
Cell	404-618-6089
Payroll Service Id	Specify Payroll Service Id
Title	The best of the best
Occupation	Project Secretary
Supervisor	(#134) Cox; Dallen M
Misc1	Not Specified
Misc2	Not Specified

Navigation: HR>Configuration>Type Lists.

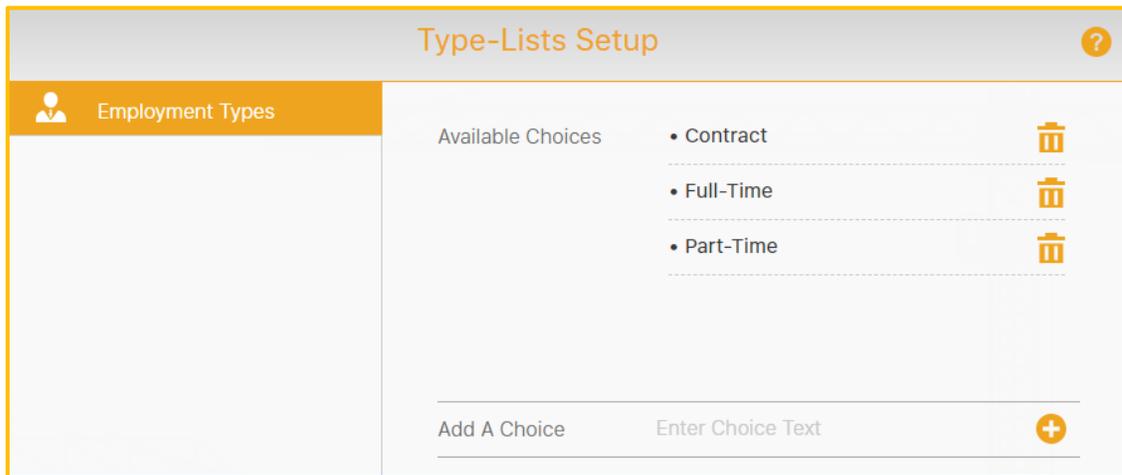


The screenshot shows the 'Type-Lists Setup' screen. The 'Employment Types' section is active. The 'Available Choices' list includes: 'Contract', 'Full-Time', 'Part-Time', and 'X'. Each item has a trash icon to its right. At the bottom, there is an 'Add A Choice' button and an 'Enter Choice Text' input field with a plus icon.

- Type Lists may be added or deleted.

### To Add a Type List:

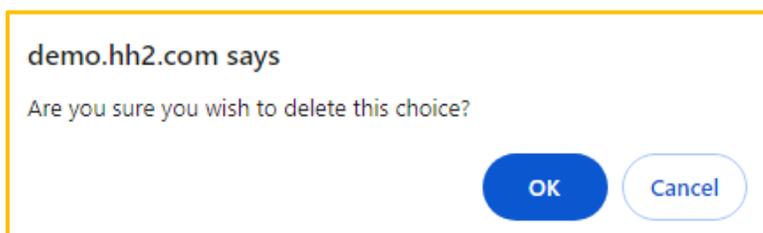
1. Navigate to HR>Configuration>Type Lists.



2. Enter the employment type in the Add a Choice field.
3. Select the Add  icon.
4. The Employment Type then appears in the Picklist in the Employment Type on the Employee Record, as well as the Type-Lists Setup Page.

### To Delete a Type List:

1. Navigate to HR>Configuration>Type Lists.
2. Select the Delete  icon next to the Employment Type to delete.



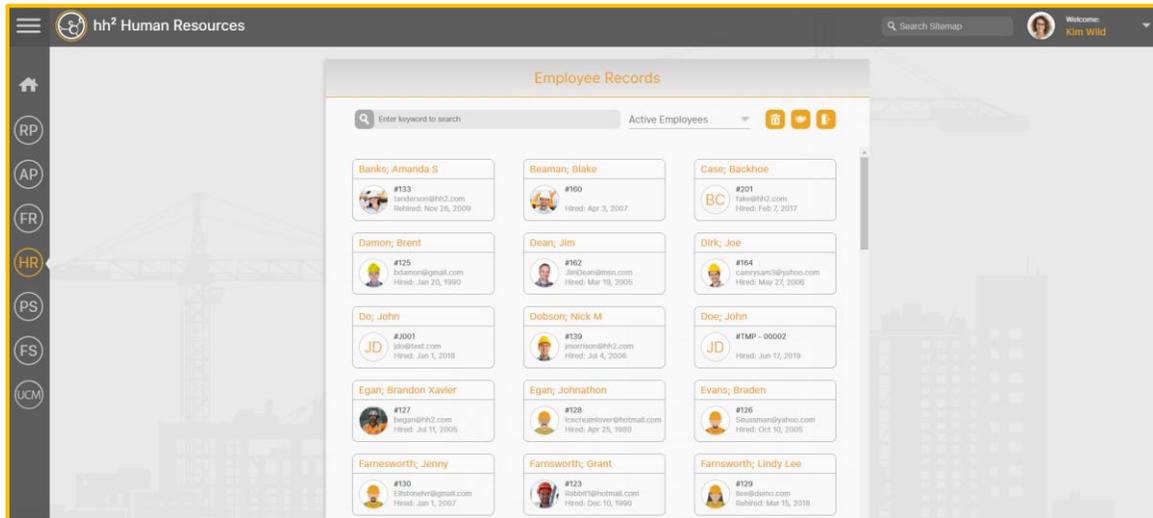
3. Select OK.

**Note:** The Knowledge Base  icon links the user to the Knowledge Base with HR related articles.

# Employee Records

Once System Setup and Configuration is complete, the user may manage Employee Records.

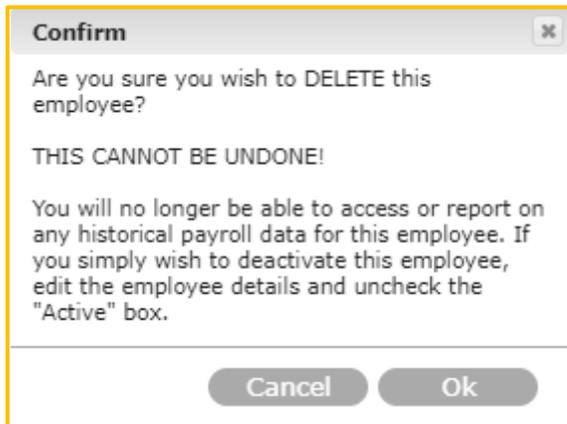
**Navigation: HR>General>Employee Records.**



- From the Employee Records Page, all employees are listed. The employees displayed for each user will be based upon the user's permissions set up within the Security Groups. These records are brought from the accounting system.
- Employees may be searched on using the Search field.
- Employees may be sorted using the Picklist (Active Employees, Inactive Employees, or All Employees).
- Employee may be deleted, activated, or deactivated.
- Further detail about the employee may be found by selecting on the specific employee.
- **Note:** Once an Employee Record is selected, the user can move to the previous or next employee using < or >, respectively.

### To Delete an Employee or Employees:

1. Navigate to HR>General>Employee Records.
2. Select the Delete  icon.
3. Select the Delete  icon next to the employee(s) to delete.



4. Read the warning.
5. If sure, select Ok. If not, select Cancel.

### To Activate Employees:

1. This will activate all employees who are currently employed based on hire/rehire and termination dates.
2. Navigate to HR>General>Employee Records.
3. Select the Activate  icon. Note: The Picklist selection (Active Employees, Inactive Employees or All Employees) may assist in filtering data based upon what the user wishes to accomplish.

### To Deactivate Employees:

1. This will deactivate all employees considered unemployed based on hire/rehire and termination dates.
2. Navigate to HR>General>Employee Records.
3. Select the Deactivate  icon. Note: The Picklist selection (Active Employees, Inactive Employees or All Employees) may assist in filtering data based upon what the user wishes to accomplish.

## The Employee Record

Navigation: HR>General>Employee Records>select a specific employee record>Info tab at the top.

The screenshot shows the 'Employee Details' page for Brandon Xavier Egan. At the top, there is a header with the employee's name, a photo, and a gear icon for settings. Below the header is a navigation bar with tabs: Info (selected), Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The main content area is divided into two columns. The left column contains a list of options: Change Request, Employee Photo, Employee Mappings, Address, Personal Info, Sensitive Info, Payroll Info, Emergency Contacts, Identifications, Languages, Substitutes, and Comments. The right column displays the employee's details in a form-like structure. At the bottom, it shows the user who modified the record and the date/time.

Field	Value
Code	127
Imported Name	Egan; Brandon Xavier
First Name	Brandon
Middle Name	Xavier
Last Name	Egan
Hire Date	07/11/2005
Rehire Date	Not Specified
Termination Date	Not Specified
Employment Type	Full-Time
Is Active	<input checked="" type="checkbox"/> Yes
Email	began@hh2.com
Phone	(803) 426-5543
Cell	(803) 426-9998
Payroll Service Id	Specify Payroll Service Id
Title	Journeyman Carpenter
Occupation	Not Specified
Supervisor	(#123) Farnsworth; Grant
Misc1	Not Specified
Misc2	Not Specified

Modified by Wild, Kim (kim) on Oct 21, 2013 11:30 pm

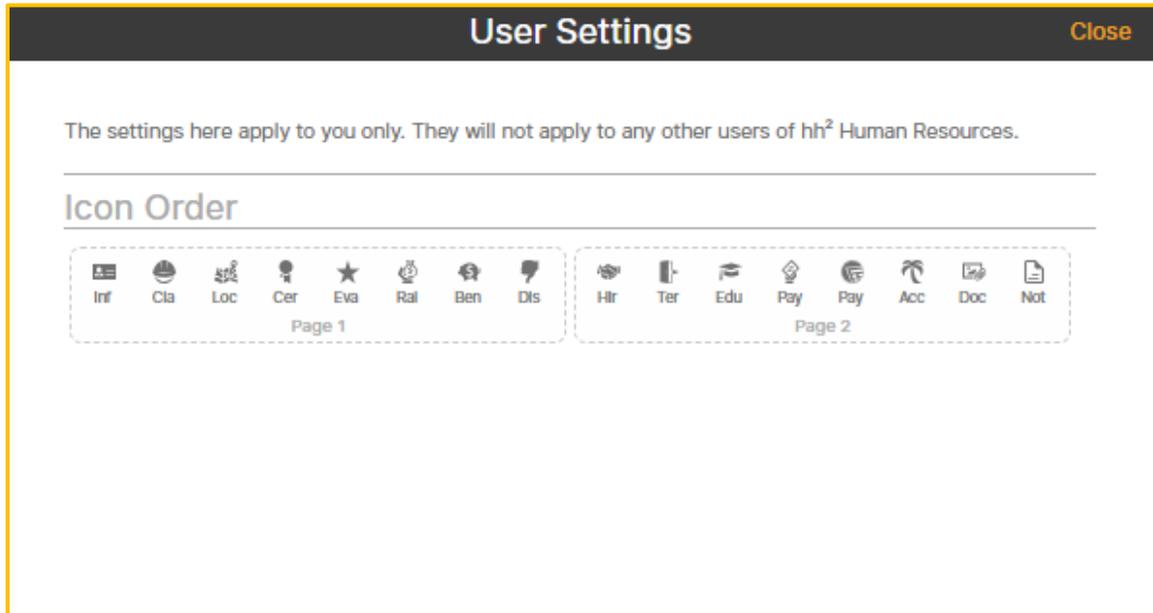
- Within the Employee Record, tabs run across the top and along the left side. Tabs on the left side will vary based upon the top tab selection.
- The employee's hire date, employment status, and residence display at the top.
- User settings are available.
- Modified by and date and time display at the bottom of the page.

## User Settings

Each HR Administrator may set their own user preferences from the Employee Records Page.

### To Set User Settings:

1. Navigate to HR>General>Employee Records>select a specific employee record.
2. Select the Settings  icon in the upper right corner.



3. Drag and drop the icons in the order the logged in user prefers. This will order the icons at the top of the Employee Record to suit the logged in user's preference.
4. Select Close.
5. The icons will now display for that user in the order set up on the User Settings Page for all Employee Records.

## Information Tab

Navigation: HR>General>Employee Records>select a specific employee record>Info tab at the top>Employee Details tab on the side.

The screenshot displays the 'Employee Details' page for Blake Beaman (#160). The page is divided into a sidebar on the left and a main content area on the right. The sidebar contains the following tabs: Employee Photo, Employee Mappings, Address, Personal Info, Sensitive Info, Payroll Info, Emergency Contacts, Identifications, Languages, Substitutes, and Comments. The main content area is titled 'Employee Details' and contains the following information:

* Code	160
Imported Name	Beaman, Blake
* First Name	Blake
Middle Name	Specify Middle Name
* Last Name	Beaman
* Hire Date	04/03/2007
Rehire Date	Not Specified
Termination Date	Not Specified
Employment Type	Not Specified
Is Active	<input checked="" type="checkbox"/> Yes
Email	Specify Email Address
Phone	777-888-9999
Cell	666-555-2222
Payroll Service Id	Specify Payroll Service Id
Title	General Laborer
Occupation	Not Specified
Supervisor	Not Specified
Misc1	Not Specified
Misc2	Not Specified

Modified by Admin, hh2 (hh2\_admin) on Oct 27, 2014 12:04 pm

When the Information  tab is selected at the top of the Employee Record, the Employee Details tab displays by default. Within Employee Details, data from the accounting system is populated. Details include:

- Employee's Code
- Imported Name
- Name (First, Middle, and Last)
- Hire, Rehire and Termination Date (if updated in the accounting system, these dates will update in hh2)
- Employment Type (Not Specified, Contract, Full-Time, or Part-Time). Or whatever employment types are set up in HR>Configuration>Types List.
- Active or Not
- Email, Phone and Cell Phone number
- Payroll Service Identification for third party payroll services
- Title and Occupation
- Supervisor's Name
- Two Miscellaneous categories to be used based on the construction company's preferences.

**Note:** Sage 300 CRE must be used to update information back to the accounting system.

## Change Request

The Change Request tab displays Change Request information from the employee.

**Navigation:** HR>General>Employee Records>specific employee>Info tab at the top>Change Request. **Note:** The Change request tab will only display when a Change Request exists for the employee. It is good practice to refresh this page upon entry.

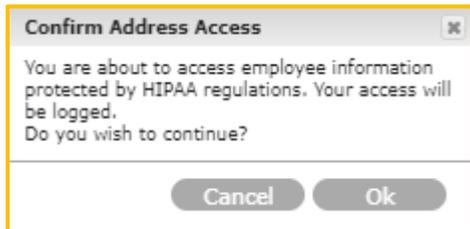
The screenshot shows the 'Change Request' tab for employee Brandon Xavier Egan. The interface is divided into two columns. The left column contains a list of tabs: Employee Details, Change Request (highlighted), Employee Photo, Employee Mappings, Address, Personal Info, Sensitive Info, Payroll Info, Emergency Contacts, Identifications, Languages, Substitutes, and Comments. The right column displays a comparison of employee data between the current state and the requested change. At the bottom, there are two buttons: 'Reject Changes' and 'Accept Changes'.

Field	Current Value	Requested Change
First Name	Brandon	⇒ Brandon
Middle Name	Xavier	⇒ Xavier
Last Name	Egan	⇒ Egan
Address	123 Cold Springs RD	⇒ 456 Cold Springs RD
Apt./Suite	Not Specified	⇒ Not Specified
City	West Haven	⇒ West Haven
State	Utah	⇒ Utah
Zip	84015	⇒ 84015
Phone	(803) 426-5543	⇒ (803) 426-5543
Cell	(803) 426-9998	⇒ (803) 426-9998
Email	began@hh2.com	⇒ began@hh2.com
Date of Birth	Not Specified	⇒ Not Specified
Marital Status	Divorced	⇒ Divorced
Gender	Male	⇒ Male
Ethnicity	Caucasian	⇒ Caucasian
Origin	Australia	⇒ Australia

- The Change Request tab allows HR Administrators/Managers to view Change Requests input by the employee on the My Records Mobile Application or from the hh2 website.
- The HR Administrator/Manager will either Accept Changes or Reject Changes requested by the employee.
- Any changes made will be updated in the Sage 300 CRE system only after the HR Administrator/Manager accepts them.
- The left column represents existing employee data, and the right column represents the change requested for the employee's data.

### To Accept Changes:

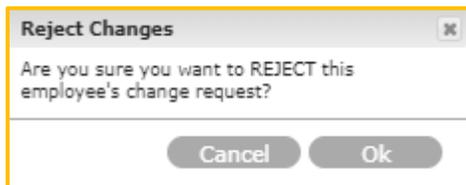
1. Navigate to HR>General>Employee Records>specific employee>Info tab at the top>Change Request.



2. Select Ok.
3. Select Accept Changes. The data will be updated on the Employee Record, as well as in the accounting system. The Change Request tab will disappear.

### To Reject Changes:

1. Navigate to HR>General>Employee Records>specific employee>Info tab at the top>Change Request.



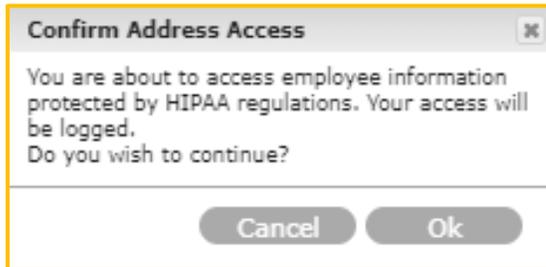
2. Select Ok.
3. Select Reject Changes.
4. Select Ok.
5. The Change Request tab disappears.

**Note:** The employee is not notified either way. Changes are saved to the Employee Record upon acceptance, or they are not if rejected.

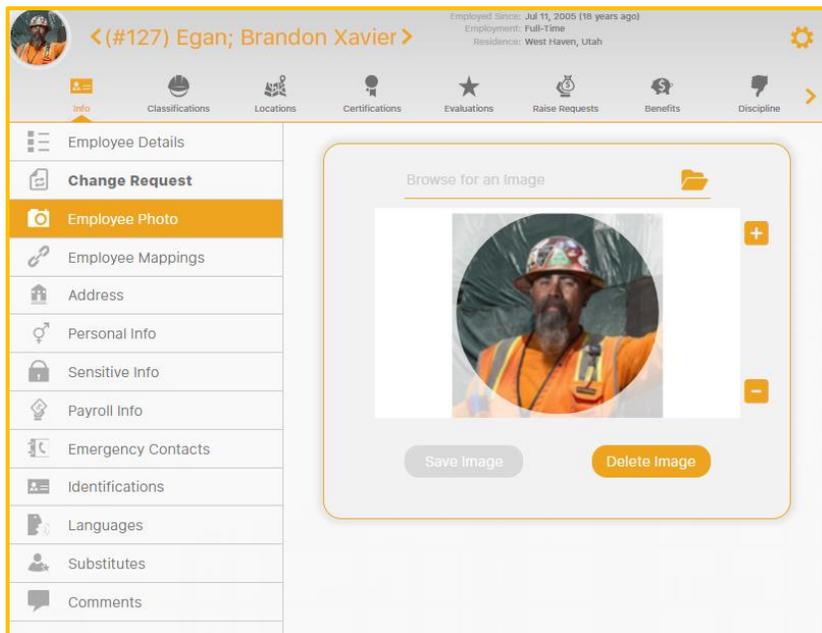
## Employee Photo

An employee photo may be uploaded by the HR Manager/Administrator or on the My Records Mobile Application by the employee.

**Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Employee Photo.**



1. Select Ok.



- From the Employee Photo Page, a photo can be added, deleted, or zoomed in or out.

**To Add a Photo:**

1. Navigate to HR>General>Employee Records>specific employee>Info tab>Employee Photo.
2. Browse for a photo using the Folder  icon.
3. Select the image and choose Open.
4. Select Save Image.
5. The image will now display on the employee's record.

**To Delete a Photo:**

1. Navigate to HR>General>Employee Records>specific employee>Info tab>Employee Photo.
2. Select Delete Image.
3. The image immediately deletes.

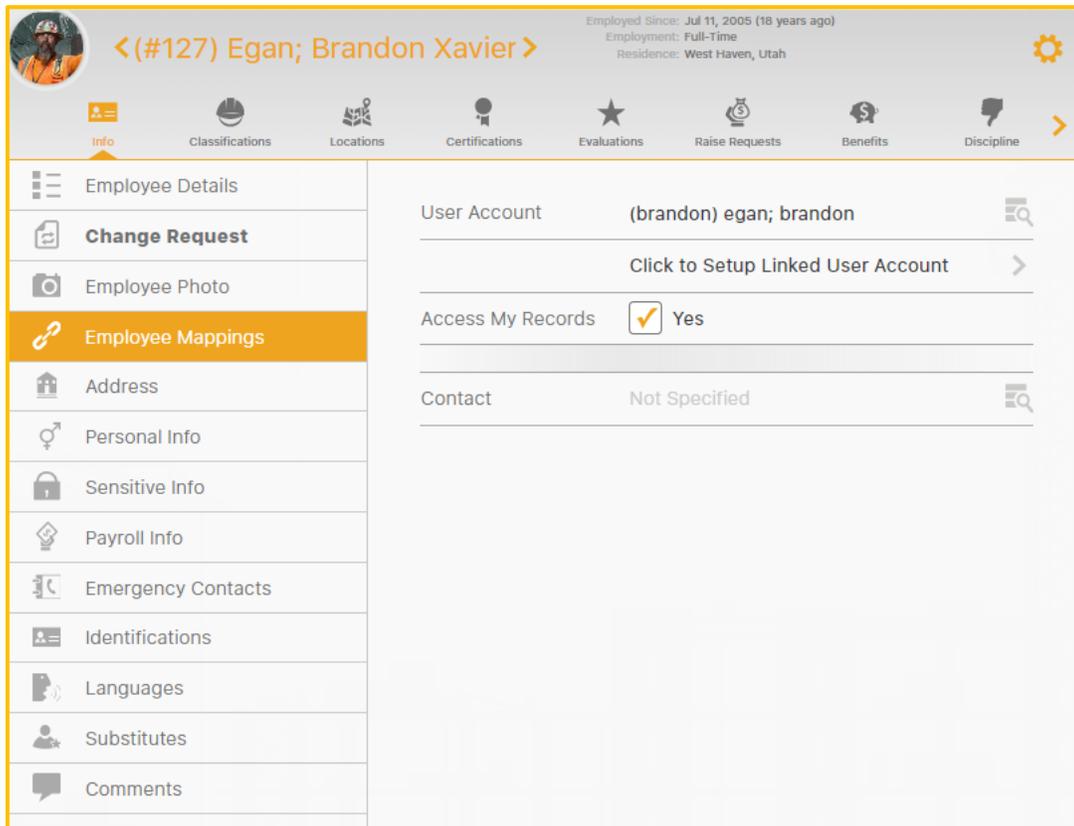
**To Zoom In or Out:**

1. Navigate to HR>General>Employee Records>specific employee>Info tab>Employee Photo.
2. Use the  to display the photo larger.
3. Use the  to display the photo smaller.

## Employee Mappings

The purpose of Employee Mappings is to map an employee record to an employee so they may access their own employee information on the My Records Mobile Application. Employee Mappings are also used in the Remote Payroll module for Time Entry, and Pay Stubs.

**Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Employee Mappings.**



### To Map an Employee:

1. Navigate to HR>General>Employee Records>specific employee>Info Tab at the top>Employee Mappings tab.
2. Select the User Account field, use the Magnifying  icon as needed to find the employee.
3. Check Access My Records.
4. Employee contact information can be mapped as well by selecting the employee's name from the Contact field.

## Address

Employee address information is also stored in the Address tab.

**Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Address tab.**

The screenshot displays the HR system interface for employee Brandon Xavier Egan. The top navigation bar includes tabs for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The main content area is divided into a left sidebar with menu items and a right pane showing address details. The 'Address' tab is selected in the sidebar. The address details are as follows:

Address	123 Cold Springs RD
Apt./Suite	Not Specified
City	West Haven
State	Utah
Postal Code	84015

### To Access Employee Address Information:

1. Navigate to HR>General>Employee Records>specific employee>Info tab at the top> Address tab.

The screenshot shows a 'Confirm Address Access' dialog box with the following text:

**Confirm Address Access**

You are about to access employee information protected by HIPAA regulations. Your access will be logged.  
Do you wish to continue?

Buttons: Cancel, Ok

2. When users access the Address tab, a warning message appears stating that the employee address information is protected, and user access will be logged.
3. Select Ok to continue, otherwise select Cancel.
4. The employee's address displays when Ok is selected.

## Personal Information

Gender, Ethnicity, Nation of Origin and Marital Status are stored in the Personal Information tab.

**Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Personal Info tab.**

The screenshot displays the HR system interface for employee Brandon Xavier. The top header shows the employee's name, ID (#127), and a profile picture. To the right, it lists employment details: "Employed Since: Jul 11, 2005 (18 years ago)", "Employment: Full-Time", and "Residence: West Haven, Utah". A navigation bar below the header contains icons for various HR functions: Info (selected), Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The main content area is split into a left sidebar and a right main panel. The sidebar lists various information categories, with "Personal Info" highlighted in orange. The main panel displays the following fields:

Gender	Male	▼
Ethnicity	Caucasian	▼
Nation of Origin	Australia	🔍
Marital Status	Divorced	▼

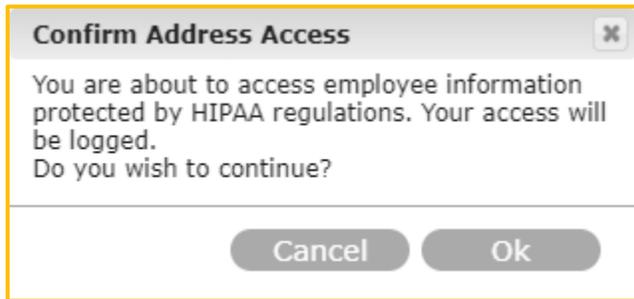
### To Modify Personal Information:

1. Select data from the dropdown Picklists.
2. The system will automatically save the changes.

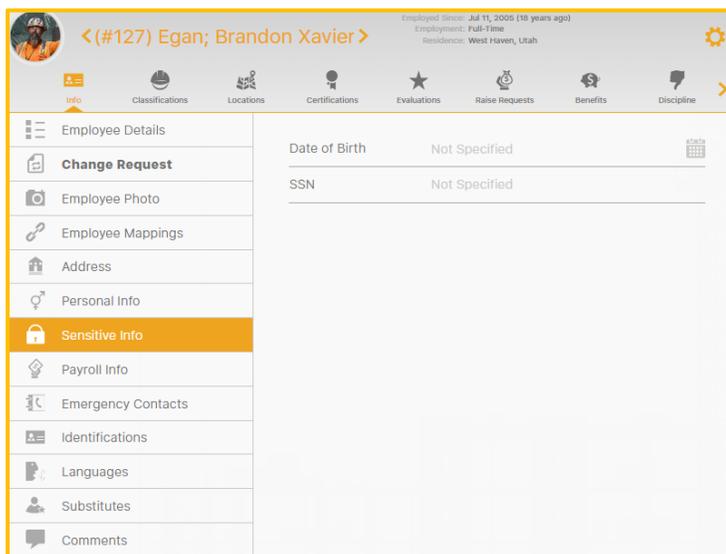
## Sensitive Information

Date of Birth and Social Security Number(SSN) are stored in the Sensitive Information tab.

**Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Sensitive Information tab.**



1. When users access the Sensitive Information tab, a warning message appears stating that the employee address information is protected, and user access will be logged.
2. Select Ok to continue, otherwise cancel.



### To Modify Sensitive Information:

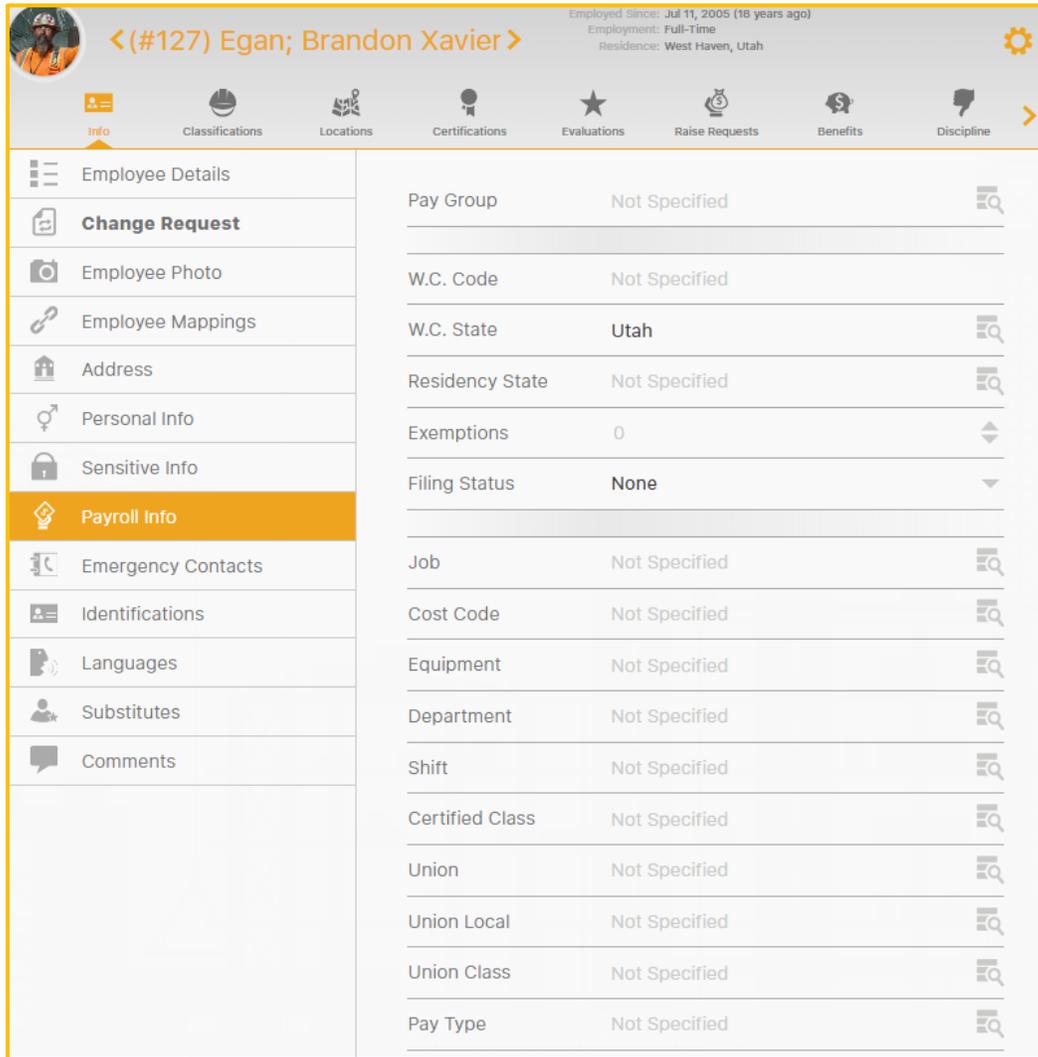
1. Make the modifications.
2. The system will automatically save the changes.

**Note:** On HR>Settings>System Settings>Employee Record tab>the Display Last 4 of SSN field allows Administrators to choose whether those with explicit permission can view the entire SSN of employees or if they can only view the last 4 digits. To remove employee SSN from the hh2 site entirely, simply reach out to the hh2 Implementation or Support team for further assistance.

## Payroll Information

Payroll Information stores all information related to the employee's payroll. This information is pulled from the accounting system.

**Navigation:** HR>General>Employee Records>specific employee>Info tab at the top>Payroll Information tab.



The screenshot displays the HR system interface for employee Brandon Xavier Egan (#127). The top navigation bar includes tabs for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The 'Payroll Info' tab is selected and highlighted in orange. The main content area shows a list of payroll-related fields with their current values and search icons. The fields and their values are:

Pay Group	Not Specified	🔍
W.C. Code	Not Specified	
W.C. State	Utah	🔍
Residency State	Not Specified	🔍
Exemptions	0	⬇️
Filing Status	None	⬇️
Job	Not Specified	🔍
Cost Code	Not Specified	🔍
Equipment	Not Specified	🔍
Department	Not Specified	🔍
Shift	Not Specified	🔍
Certified Class	Not Specified	🔍
Union	Not Specified	🔍
Union Local	Not Specified	🔍
Union Class	Not Specified	🔍
Pay Type	Not Specified	🔍

### To Modify Payroll Information:

1. Information can be modified using the associated Magnifying  icon or the Picklist arrows.

**Note:** This information will update to the Sage 300 accounting system.

## Emergency Contacts

The employee's emergency contacts are stored in the Emergency Contact tab and can be added, modified, or deleted. **Note:** This information does not synchronize back to the accounting system.

**Navigation:** HR>General>Employee Records>specific employee>Info tab at the top>Emergency Contact tab.

The screenshot displays the HR system interface for employee Brandon Xavier Egan. The top navigation bar includes a profile picture, the employee's name <(#127) Egan; Brandon Xavier >, and employment details: Employed Since: Jul 11, 2005 (18 years ago), Employment: Full-Time, and Residence: West Haven, Utah. Below the navigation bar is a horizontal menu with icons for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The main content area is divided into a left sidebar and a main panel. The sidebar lists various tabs: Employee Details, Change Request, Employee Photo, Employee Mappings, Address, Personal Info, Sensitive Info, Payroll Info, Emergency Contacts (highlighted in orange), Identifications, Languages, Substitutes, and Comments. The main panel features a search bar with the placeholder text "Type a keyword and hit the 'Enter' key to search". Below the search bar, there are three contact cards. The first card is for "Egan; Bridgette", identified as a Spouse, with phone number (801) 555-6655 and cell number (555) 666-6525. The second card is for "Egan; Tom", identified as a Brother, with phone number (801) 556-1254 and an empty cell field. The third card is for "jones; John", identified as a brother, with phone number (801) 555-3628 and an empty cell field.

### To Add an Emergency Contact:

1. Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Emergency Contact tab.
2. Select the Add  icon.

### Add Emergency Contact Close

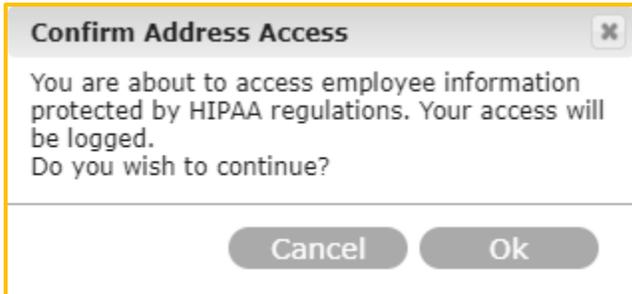
* First Name	Specify First Name	Address	Hidden
Middle Name	Not Specified	Apt./Suite	Hidden
* Last Name	Specify Last Name	City	Not Specified
* Relation	Specify Relation	State	Not Specified 
* Phone	Specify Phone Number	Postal Code	Not Specified
Cell	Not Specified		

[Save Contact](#)

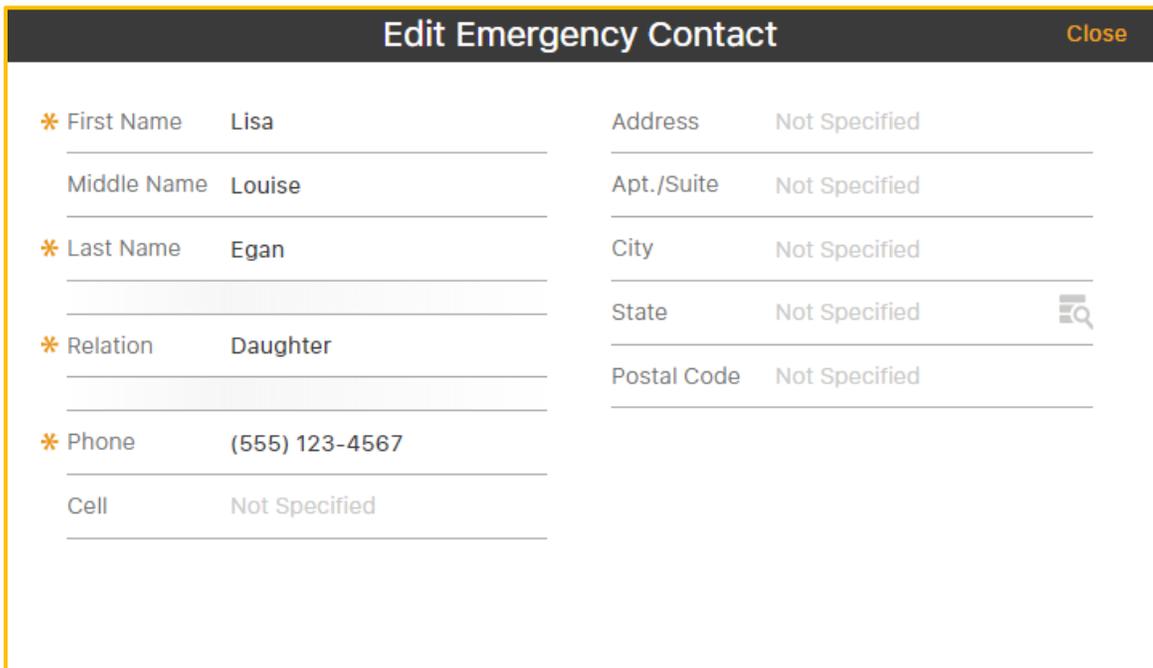
3. Complete the Emergency Contact information on the Add Emergency Contact Page.
4. Select Save Contact.

### To Modify an Emergency Contact:

1. Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Emergency Contact tab.
2. Select the Emergency Contact.



3. Select Ok.

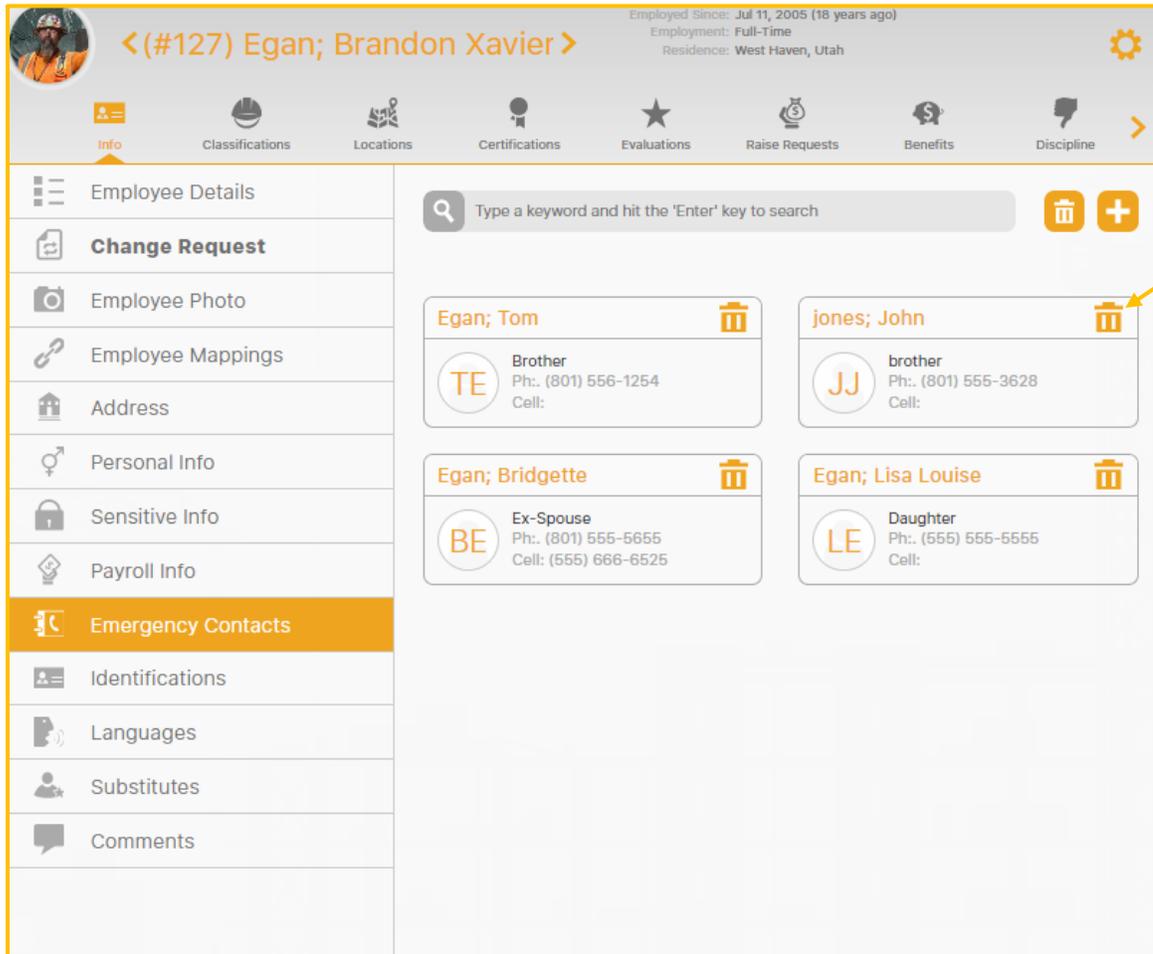
A form titled "Edit Emergency Contact" with a "Close" button in the top right corner. The form contains several fields with labels and values:

* First Name	Lisa	Address	Not Specified
Middle Name	Louise	Apt./Suite	Not Specified
* Last Name	Egan	City	Not Specified
* Relation	Daughter	State	Not Specified
* Phone	(555) 123-4567	Postal Code	Not Specified
Cell	Not Specified		

4. Make the modification(s) on the Edit Emergency Contact Page.
5. The Ajax check mark will indicate the change was accepted.
6. Select Close.

## To Delete an Emergency Contact:

1. Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Emergency Contact tab.
2. Select the Delete  icon.



The screenshot displays the HR system interface for employee Brandon Xavier. The top navigation bar includes tabs for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The left sidebar menu lists various employee details, with 'Emergency Contacts' highlighted. The main content area shows a search bar and a list of emergency contacts, each with a delete icon. An arrow points to the delete icon for 'jones; John'.

Name	Relationship	Phone	Cell
Egan; Tom	Brother	(801) 556-1254	
jones; John	brother	(801) 555-3628	
Egan; Bridgette	Ex-Spouse	(801) 555-5655	(555) 666-6525
Egan; Lisa Louise	Daughter	(555) 555-5555	

3. Delete icons will now display next to the Emergency Contact's name.
4. Select the Delete  icon for each Emergency Contact to delete.
5. Select the Delete  icon to exit the delete mode.

## Identifications

Employee identifications, such as driver's licenses and social security cards are stored in the Identifications tab. This is a convenient place to store I-9 identification information.

**Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Identifications tab.**

The screenshot displays the HR system interface for employee Brandon Xavier Egan. The top navigation bar includes a search field with the placeholder text "Type a keyword and hit the 'Enter' key to search". Below the search bar, there are two identification cards:

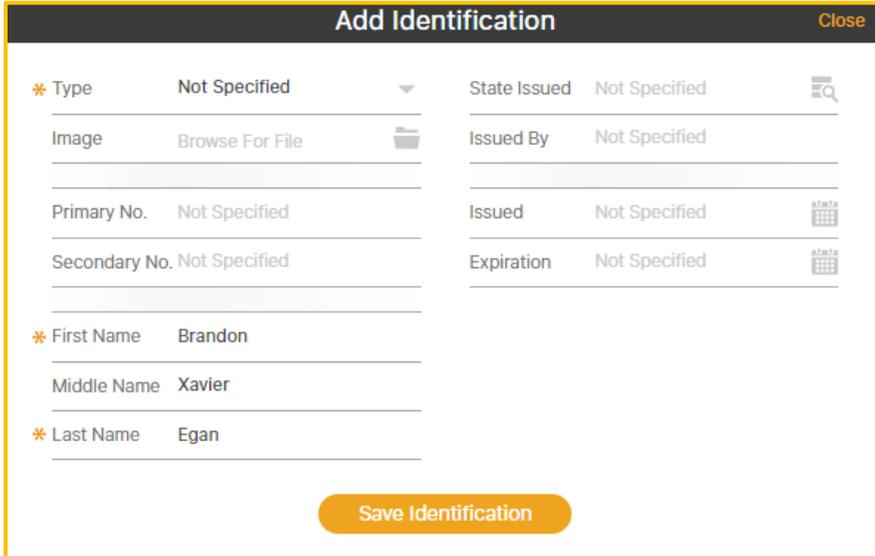
- Drivers License** (ID: #171546584): Issued: Feb 5, 2005; Expires: Feb 1, 2024. The card image shows a California Driver License for Brandon Xavier Egan.
- Social Security Card** (ID: #34324234234): Issued: N/A; Expires: N/A. The card image shows a Social Security Card for Brandon Xavier Egan.

The left sidebar contains a list of tabs: Employee Details, Change Request, Employee Photo, Employee Mappings, Address, Personal Info, Sensitive Info, Payroll Info, Emergency Contacts, **Identifications** (highlighted), Languages, Substitutes, and Comments.

- Forms of identification can be searched using the Search field. Likewise, forms of identification can be added and deleted.

### To Add a Form of Identification:

1. Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Identifications tab.
2. Select the Add  icon.

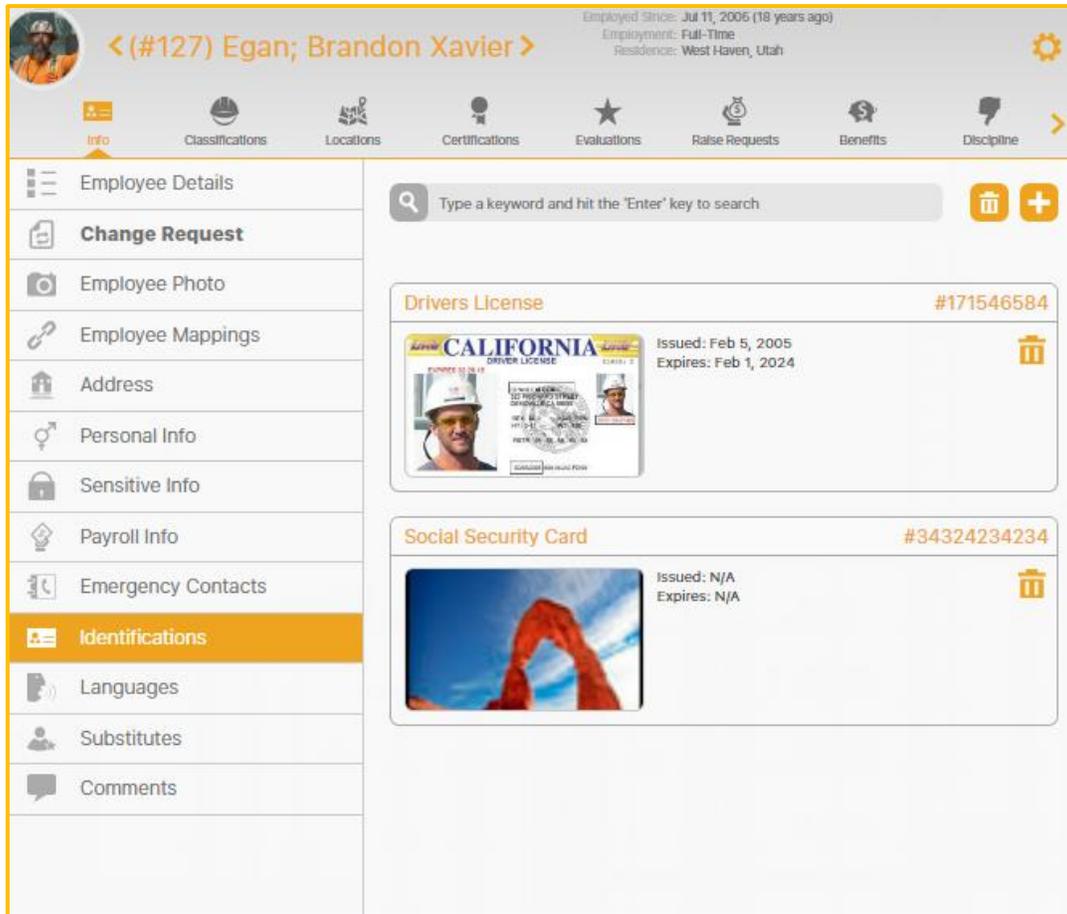


The screenshot shows a form titled "Add Identification" with a "Close" button in the top right corner. The form is divided into two columns of input fields. The left column includes: a dropdown menu for "Type" (currently "Not Specified"), a file upload field for "Image" (with a "Browse For File" button), text input fields for "Primary No." and "Secondary No." (both "Not Specified"), and text input fields for "First Name" (Brandon), "Middle Name" (Xavier), and "Last Name" (Egan). The right column includes: a dropdown menu for "State Issued" (currently "Not Specified"), a text input field for "Issued By" (currently "Not Specified"), and two calendar pickers for "Issued" and "Expiration" (both "Not Specified"). At the bottom center of the form is a prominent orange "Save Identification" button.

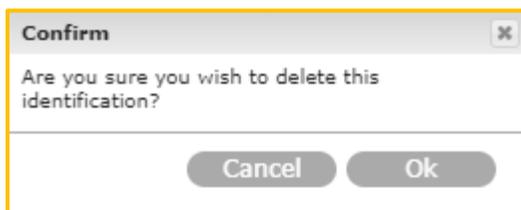
3. Enter the Type of Identification.
4. Upload an image: Select the Image field and Open.
5. Enter Primary and/or secondary numbers associated with the identification.
6. Enter First, Middle and Last Name.
7. Enter the State or Province (for Canada) Issued and Country (from the Picklist).
8. Enter the issued by information in the Issued By field.
9. Enter the Issued Date using the calendar.
10. Enter the Expiration Date using the calendar.
11. Select Save Identification.

### To Delete a Form of Identification:

1. Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Identifications tab.
2. Select the Delete  icon next to the Search field.
3. Delete  icons will now display next to all forms of identification.



4. Select the Delete  icon for each form of identification to delete.



5. Select Ok to confirm deletion.
6. The form of identification will no longer display.

## Languages

Languages spoken by the employee can be listed and rated here. Languages may be added and deleted.

**Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Languages tab.**

Language	Rating	Action
English	3.50	Delete
Spanish	5.00	Delete
Korean	3.25	Delete
Arabic	2.75	Delete
Add Language	Select A Language	Add

### To Add a Language:

1. Select a language from the Picklist in the Add Language field.
2. Select the Add  icon.

### To Rate the Employee's Language Skills:

1. Click on the scale for the language.
2. Move the mouse from 0 to 5.
3. Once the proper rating is listed, click on the scale to save the selection.
4. The Ajax check mark will briefly display indicating the rating was saved.

### To Delete a Language:

1. Select the Delete  icon next to the language.
2. This will immediately delete the language.

## Substitutes

The Substitutes tab is used to list adequate substitutes for the employee when they are absent or need to be moved to another job. Substitutes may be added or deleted.

**Navigation: HR>General>Employee Records>specific employee>Info tab at the top>Substitutes tab.**

The screenshot displays the HR system interface for employee Brandon Xavier (#127). The top navigation bar includes a profile picture, the employee's name, and a settings gear icon. Below the navigation bar is a horizontal menu with icons for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The main content area is divided into two columns. The left column contains a vertical list of tabs: Employee Details, Change Request, Employee Photo, Employee Mappings, Address, Personal Info, Sensitive Info, Payroll Info, Emergency Contacts, Identifications, Languages, Substitutes (highlighted in orange), and Comments. The right column shows the Substitutes list with two entries: (#164) Dirk; Joe and (#125) Damon; Brent, each with a delete icon. Below the list are the options 'Add A Substitute' and 'Select An Employee' with a search icon and a plus sign.

### To Add a Substitute:

1. Navigate to HR>General>Employee Records>specific employee>Info tab at the top>Substitutes tab.

2. Select Magnifying  icon to find an employee for substitution.
3. Select the substitute from the Select An Employee Page. This will automatically take the user back to the Substitute tab.
4. Select the Add  icon in the Add a Substitute field.
5. The substitute will now be listed as a viable substitute for the employee in their record.

### To Delete a Substitute:

1. HR>General>Employee Records>specific employee>Info tab at the top>Substitutes tab.
2. Select the Delete  icon next to the substitute's name.
3. The substitute will immediately be deleted.

## Comments

The Comments tab can be used to store any comments about the employee. This section can be utilized to meet the construction company's needs and preferences. **Use Case:** One example of how this tab may be used is to log equipment such as phones and devices issued to the employee.

**Navigation:** HR>General>Employee Records>specific employee>Info tab at the top>Comments tab.

The screenshot shows the HR system interface for employee Brandon Xavier. The top navigation bar includes tabs for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The left sidebar lists various employee details, with 'Comments' highlighted. The main content area shows the 'Comments' section with a text input field and a sample comment: 'Brandon was issued an Apple phone and tablet.'

### To Add and Delete Comments:

1. Simply type in the Comments box. Backspace or delete comments as needed.

## Classifications Tab

The Classifications tab is used to list all Classifications the employee is assigned. **Note:** These Classifications do not necessarily synchronize with the accounting system.

**Navigation:** HR>General>Employee Records>specific employee>Classifications tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.

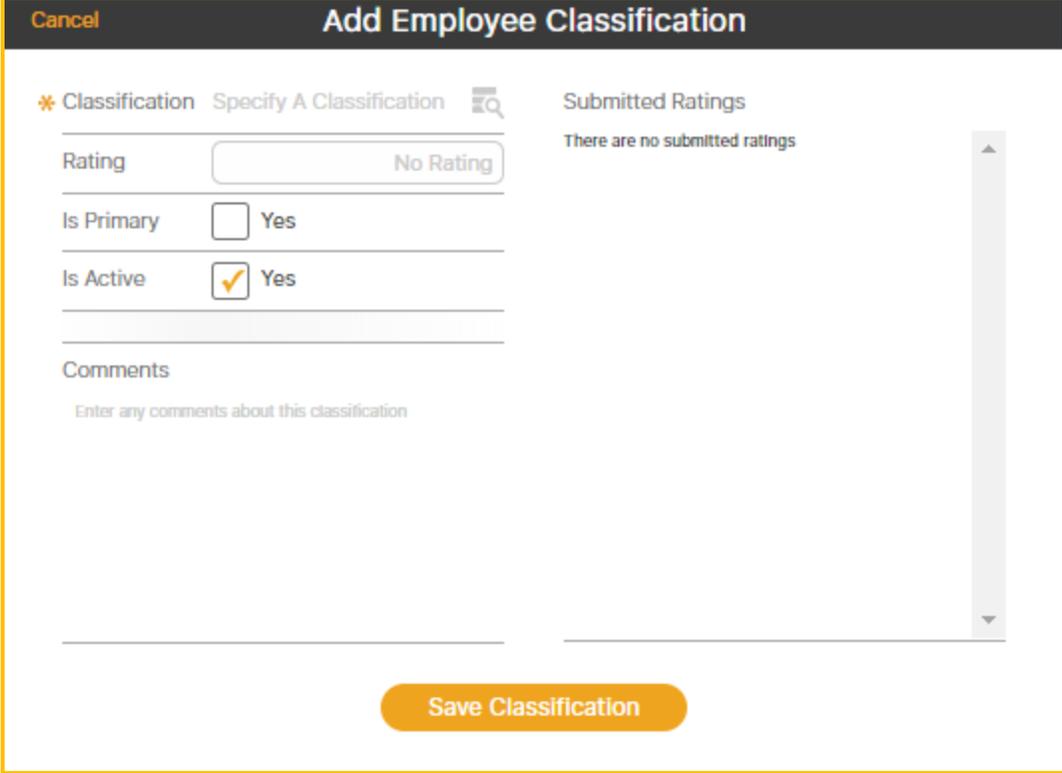
The screenshot shows the 'Classifications' tab for employee Brandon Xavier Egan. The interface includes a search bar, a filter for 'Active Classifications', and a list of four classifications with their respective ratings and details.

Classification	Rating	Submitted Ratings	Is Primary	Comments
Finish Carpenter	4.50	39 submitted (Avg. 167.00)	Yes	Rating from Pitts. Killer job
Equipment Operator	2.50	None	No	He is lazy
Trainer	0.75	None	No	None
General Foreman	No Rating	None	No	None

- Classifications can be searched for using the Search field.
- Classifications can be filtered by Active Classifications, Inactive Classifications and All Classifications using the Active Classifications Picklist.
- Classifications can also be added, edited, and deleted within the employee's record.
- Primary Classifications may also be assigned to an employee.
- Likewise, employees may be rated by Job Classification. Ratings are useful in times of lay-offs, where companies want to retain their best performing employees.

### To Add a Classification:

1. Navigate to HR>General>Employee Records>specific employee>Classifications tab at the top of the Employee Record.
2. Select the Add  icon.



**Cancel** **Add Employee Classification**

\* Classification Specify A Classification 

Rating

Is Primary  Yes

Is Active  Yes

Comments  
Enter any comments about this classification

Submitted Ratings  
There are no submitted ratings

**Save Classification**

3. Enter the Classification.
4. Select a Rating, if applicable.
5. Check if this is the employee's Primary Classification or leave the field unchecked if not.
6. Check if the Classification is Active.
7. Make any necessary comments, if applicable.
8. Select Save Classification.
9. The Classification will display on the employee's record.

### To Edit a Classification:

1. Navigate to HR>General>Employee Records>specific employee>Classifications tab at the top of the Employee Record.

**Edit Employee Classification** Close

\* Classification **Finish Carpenter**

Rating

Is Primary  Yes

Is Active  Yes

Comments  
Rating from Pitts. Killer job

Submitted Ratings (Avg. 4.282051282051282)

(kim) Wild; Kim  
4.25 Dec 11, 2023 4:27 pm

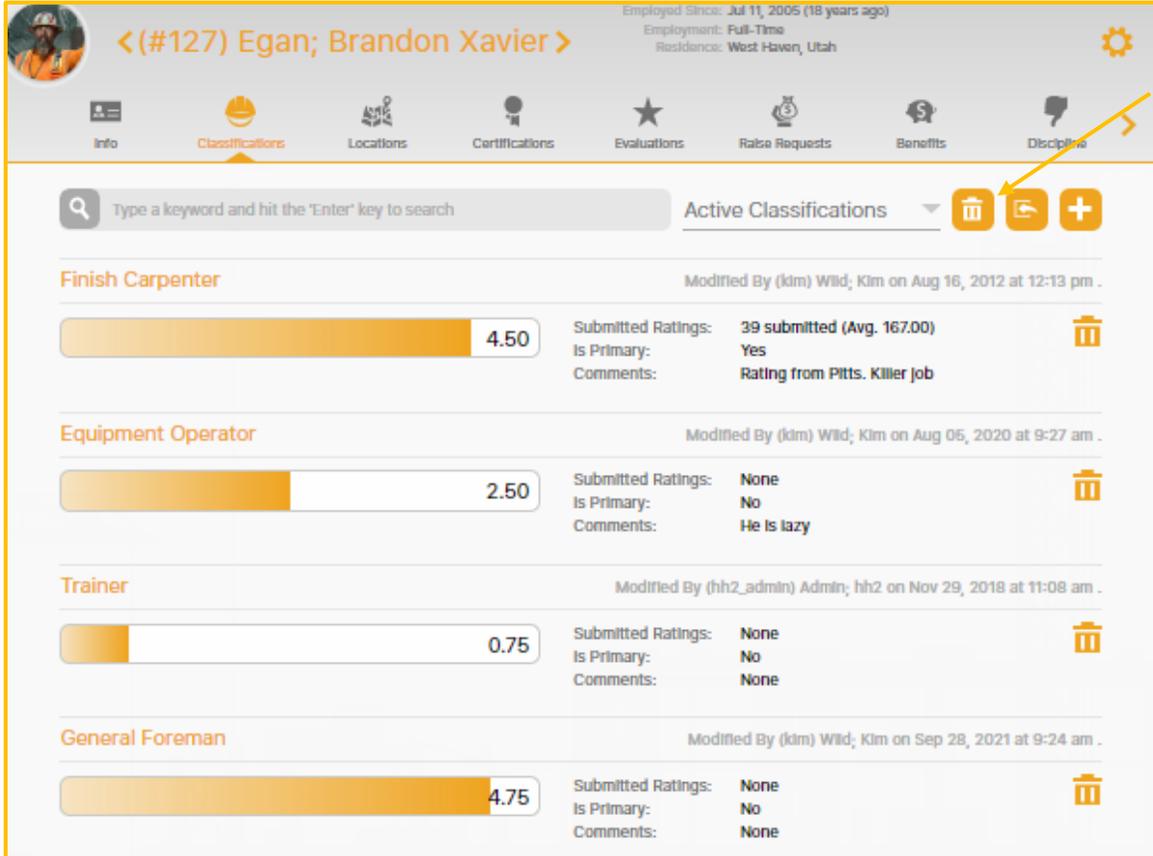
(kim) Wild; Kim  
5.00 Mar 31, 2022 9:48 am  
Concrete Crew  
GREAT!

(kim) Wild; Kim  
5.00 Oct 12, 2020 10:11 am  
Concrete Crew  
he does outstanding work. use him for the b

2. Click on the Classification.
3. Make the necessary modifications on the Edit Employee Classification Page.
4. Select Close.

## To Delete a Classification:

1. Navigate to HR>General>Employee Records>specific employee>Classifications tab at the top of the Employee Record.
2. Select the Delete  icon.



Employee: (#127) Egan; Brandon Xavier  
Employed Since: Jul 11, 2005 (18 years ago)  
Employment: Full-Time  
Residence: West Haven, Utah

Info Classifications Locations Certifications Evaluations Raise Requests Benefits Discipline

Active Classifications   

Classification	Rating	Submitted Ratings	Is Primary	Comments	Modified By
Finish Carpenter	4.50	39 submitted (Avg. 167.00)	Yes	Rating from Pitts. Killer job	(kim) Wild; Kim on Aug 16, 2012 at 12:13 pm
Equipment Operator	2.50	None	No	He is lazy	(kim) Wild; Kim on Aug 06, 2020 at 9:27 am
Trainer	0.75	None	No	None	(hh2_admin) Admin; hh2 on Nov 29, 2018 at 11:08 am
General Foreman	4.75	None	No	None	(kim) Wild; Kim on Sep 28, 2021 at 9:24 am

3. Delete icons will now display next to all Classifications.
4. Select the Delete  icon next to the Classification to delete.

demo.hh2.com says

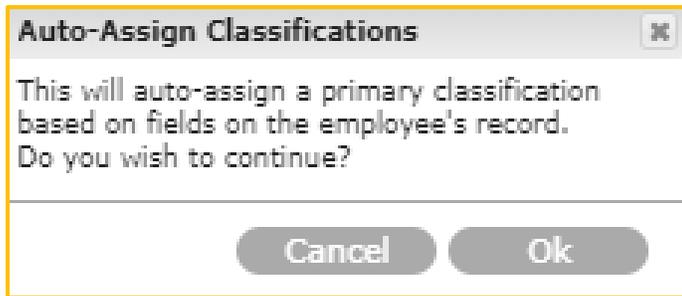
Are you sure you want to delete this entry?

5. Confirm the deletion by selecting OK.
6. Select the Delete  icon to exit the delete mode.
7. The Classification will be removed from the employee's record.

### To Assign a Primary Classification:

A Primary Classification may be assigned to an employee.

1. Navigate to HR>General>Employee Records>specific employee>Classifications tab at the top of the Employee Record.
2. Select the Auto-Assign  icon.

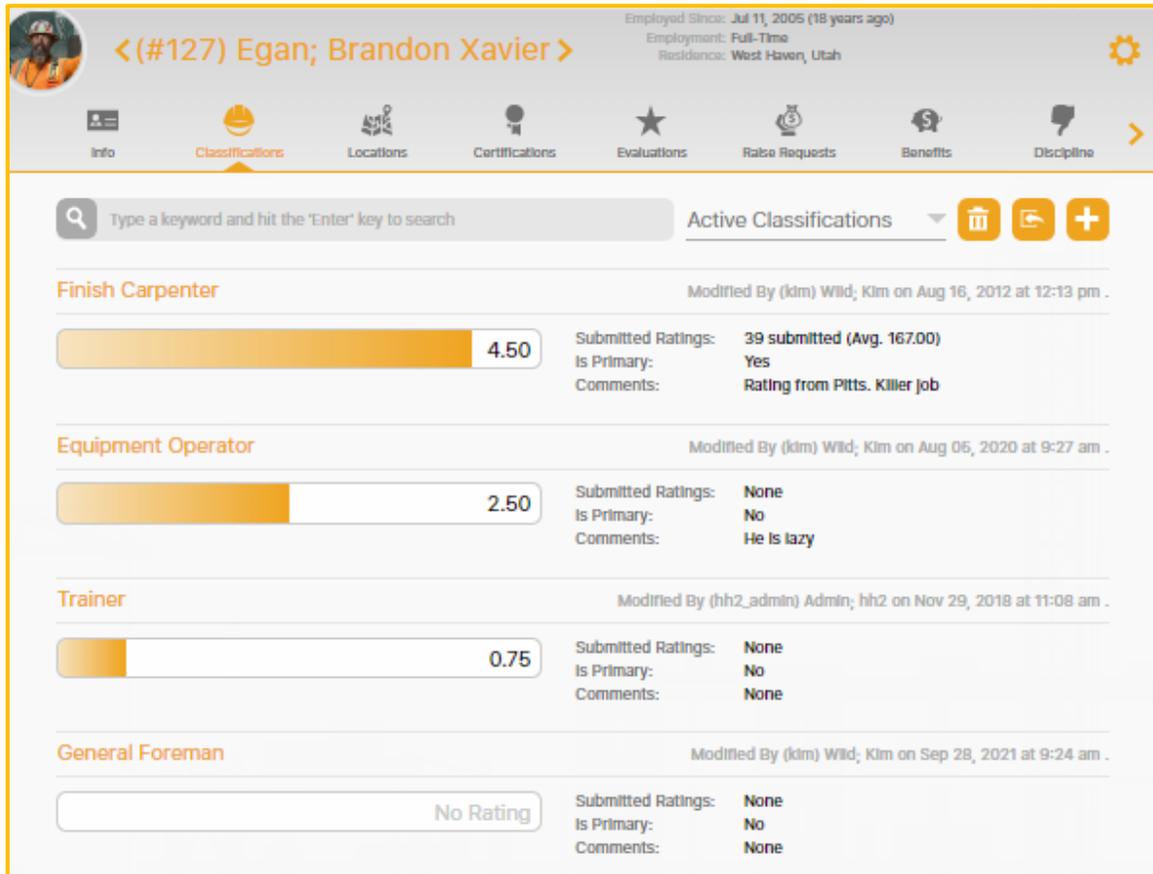


3. Select Ok.
4. Assignment of the primary classification is based upon the configuration of HR>System Setting >Sync Automation tab>Classification field. The item selected from the dropdown Picklist (Disabled, Default Certified Class, Occupation or Title) will determine from which field within the employee record is used to auto assign the primary classification.

## To Rate an Employee's Classification:

Employees may be rated on their classifications.

1. Navigate to HR>General>Employee Records>specific employee>Classifications tab at the top of the Employee Record.



Employee: (<#127) Egan; Brandon Xavier > | Employed Since: Jul 11, 2005 (18 years ago) | Employment: Full-Time | Residence: West Haven, Utah

Info | **Classifications** | Locations | Certifications | Evaluations | Raise Requests | Benefits | Discipline

Search: Type a keyword and hit the 'Enter' key to search | Active Classifications

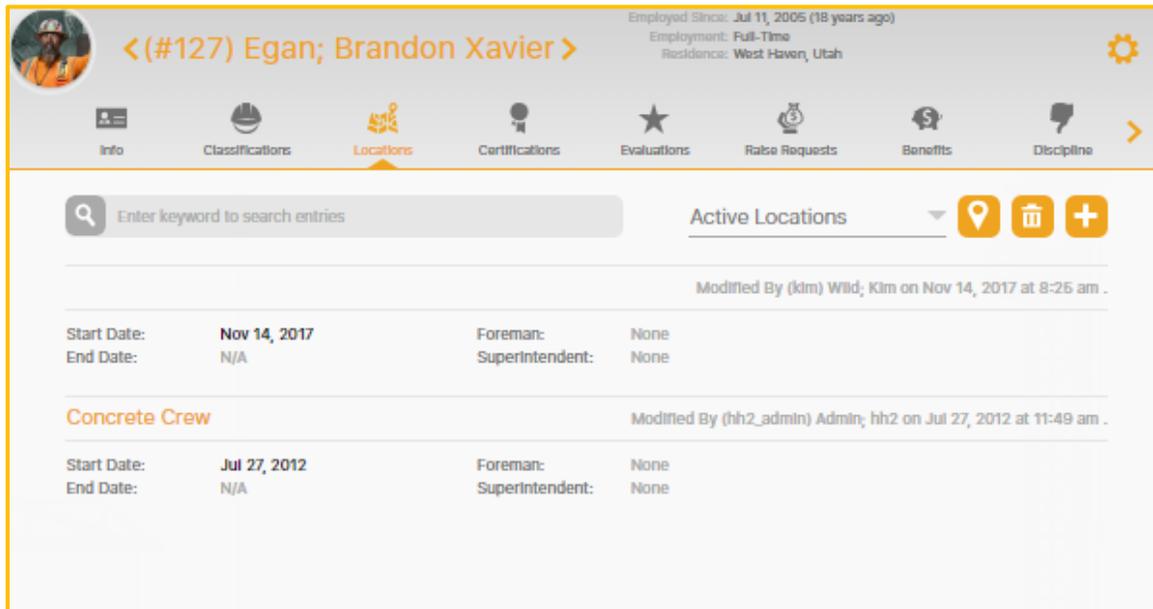
Classification	Rating	Submitted Ratings	Is Primary	Comments	Modified By
Finish Carpenter	4.50	39 submitted (Avg. 167.00)	Yes	Rating from Pitts. Killer job	(kim) Wild; Kim on Aug 16, 2012 at 12:13 pm
Equipment Operator	2.50	None	No	He is lazy	(kim) Wild; Kim on Aug 06, 2020 at 9:27 am
Trainer	0.75	None	No	None	(hh2_admin) Admin; hh2 on Nov 29, 2018 at 11:08 am
General Foreman	No Rating	None	No	None	(kim) Wild; Kim on Sep 28, 2021 at 9:24 am

2. Hover the mouse over the scale. Move the rating (from 0-5) to rate the Classification associated with the employee.
3. The Submitted Rating, along with an average score is displayed. It will be indicated whether the Classification is the employee's Primary Classification or not, and any comments will be noted. The person making the modification, along with a date and time stamp will be displayed.

## Locations Tab

The Locations tab stores all information about an employee's job location (assignment).

**Navigation:** HR>General>Employee Records>specific employee>Locations tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.



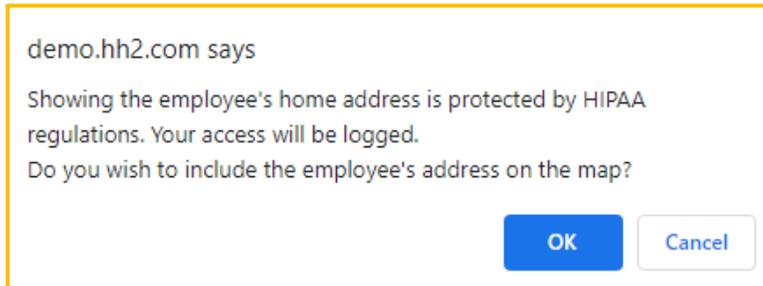
The screenshot displays the HR system interface for employee Brandon Xavier (#127). The top navigation bar includes tabs for Info, Classifications, Locations (highlighted), Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The main content area shows a search field and a dropdown menu for Active Locations. Below this, there are two location entries:

Modified By (ldm) Wild; Kim on Nov 14, 2017 at 8:25 am .			
Start Date:	Nov 14, 2017	Foreman:	None
End Date:	N/A	Superintendent:	None
<b>Concrete Crew</b>			
Modified By (hh2_admin) Admin; hh2 on Jul 27, 2012 at 11:49 am .			
Start Date:	Jul 27, 2012	Foreman:	None
End Date:	N/A	Superintendent:	None

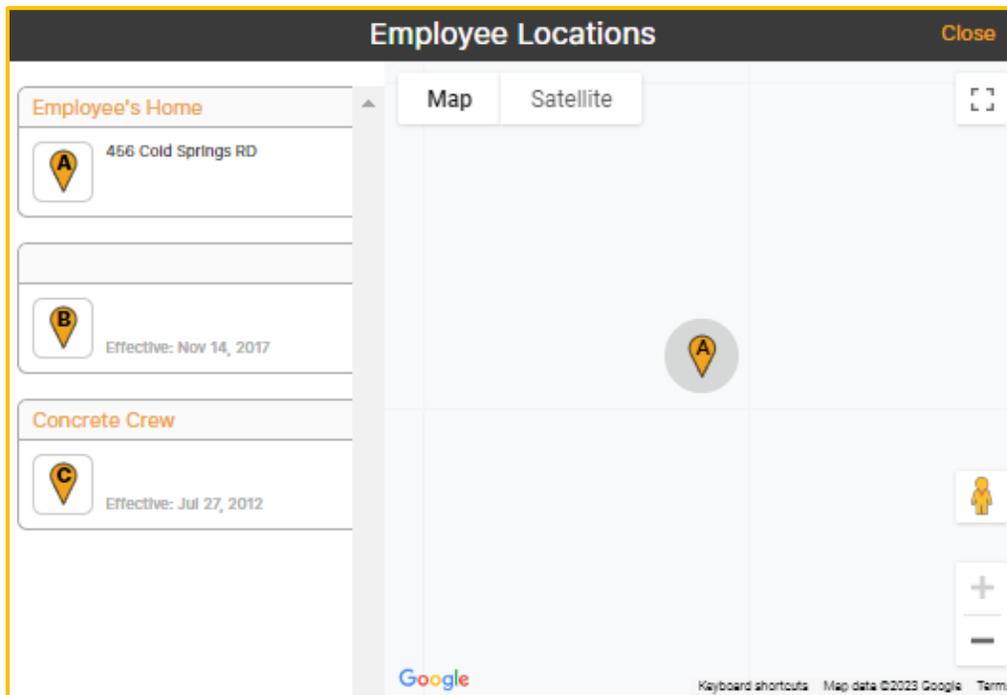
- Locations can be searched for using the Search field.
- Locations may be sorted using the dropdown Picklist for Active Locations, Inactive Locations, and All Locations.
- An employee's active location can be mapped.
- Locations may also be added, edited, and deleted.

### To View an Employee's Active Location:

1. Navigate to HR>General>Employee Records>specific employee>Locations tab at the top of the Employee Record.
2. Select the Map  icon.
3. If the employee is located at their home address, a warning will display.



4. Select OK to continue or select Cancel.



5. The employee's location will display.

## To Add a Location (Employee Assignment):

1. Navigate to HR>General>Employee Records>specific employee>Locations tab at the top of the Employee Record.

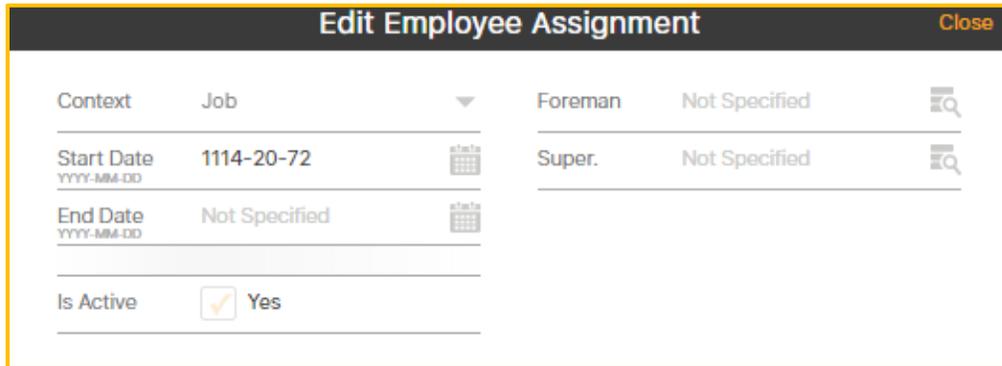
Context	Job	Foreman	Super.
Job	Specify A Job	Not Specified	Not Specified
Start Date	Not Specified		
End Date	Not Specified		
Is Active	<input checked="" type="checkbox"/> Yes		

Save Location

2. Select the Add  icon.
3. Select Job, Crew or AB (Address Book) Location from the Context Picklist. AB Location can be used to assign an employee to a particular home office or state location.
4. Enter the Job, Crew or Location (required) depending on what was selected in the step above, using the Magnifying  icon.
5. Enter Start and End Dates for this location.
6. Check if the Location is Active.
7. Enter a Foreman and/or Superintendent's name, using the Magnifying  icon.
8. Select Save Location.

### To Edit a Location (Employee Assignment):

1. Navigate to HR>General>Employee Records>specific employee>Locations tab at the top of the Employee Record.
2. Click on the Location.

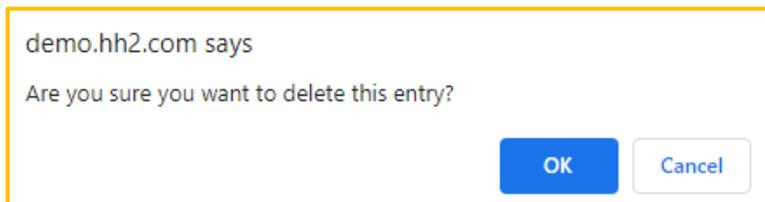


Context	Job	Foreman	Super.
		Foreman	Not Specified
Start Date YYYY-MM-DD	1114-20-72	Super.	Not Specified
End Date YYYY-MM-DD	Not Specified		
Is Active	<input checked="" type="checkbox"/> Yes		

3. Edit the necessary fields.
4. Select Close.

### To Delete a Location (Employee Assignment):

1. Navigate to HR>General>Employee Records>specific employee>Locations tab at the top of the Employee Record.
2. Select the Delete  icon.
3. Delete icons will now display next to all Locations.
4. Select the Location to delete.



demo.hh2.com says

Are you sure you want to delete this entry?

OK Cancel

5. Select OK.
6. Select the Delete  icon to exit the delete mode.
7. The Location will no longer be displayed on the employee's record.

## Certifications Tab

The Certifications tab provides a place to house certification information such as CPR, First Aid and Equipment certifications.

**Navigation: HR>General>Employee Records>specific employee>Certifications tab at the top of the Employee Record. Note:** The user may have to scroll to view some tabs.

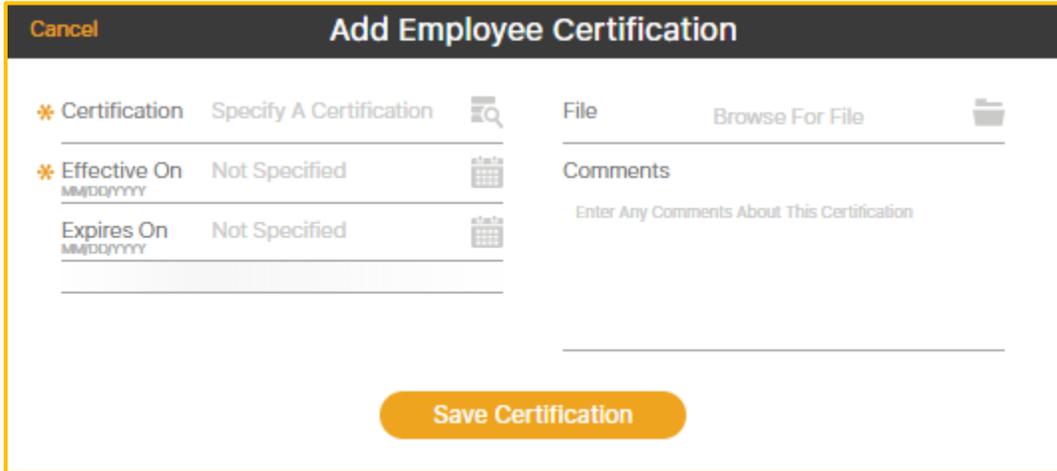
The screenshot shows the Certifications tab for employee Brandon Xavier Egan. The interface includes a search bar, a filter for 'Active Certifications', and three certification entries. The first entry is for 'CPR & FIRST AID' with an effective date of 09/07/2023 and an expiration date of 08/31/2024. The second and third entries are for 'Backhoe Certification', both with effective dates of 05/18/2023 and 05/11/2023, and expiration dates of 05/18/2024 and 05/10/2024, respectively. All entries have 'None' for comments and 'No Attachment' for the document icon.

Certification Type	Effective Date	Expires Date	Comments
CPR & FIRST AID	09/07/2023	08/31/2024	None
Backhoe Certification	05/18/2023	05/18/2024	None
Backhoe Certification	05/11/2023	05/10/2024	None

- Certifications can be searched for using the Search field, and filtered by Active Certifications, Inactive Certifications and All.
- Certifications can be added, edited, and deleted from this tab.

### To Add a Certification:

1. Navigate to HR>General>Employee Records>specific employee>Certifications tab at the top of the Employee Record.
2. Select the Add  icon.



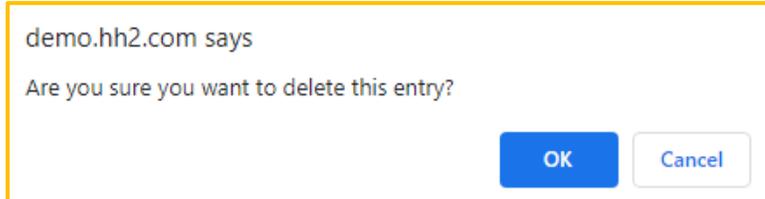
3. Enter the Certification Name, use the Magnifying  icon if needed.
4. Enter the Effective On using the calendar.
5. Select an Expires On Date using the calendar.
6. Upload the file. Select the File folder  icon, select the Certification document, then Open.
7. Write any comments.
8. Select Save Certification.

### To Edit a Certification:

1. Navigate to HR>General>Employee Records>specific employee>Certifications tab at the top of the Employee Record.
2. Click on the Certification.
3. Make the necessary modifications on the Edit Employee Certification Page.
4. Select Close.
5. The changes automatically save.

### To Delete a Certification:

1. Navigate to HR>General>Employee Records>specific employee>Certifications tab at the top of the Employee Record.
2. Select the Delete  icon.
3. Delete icons will now display next to all Certifications.
4. Select the Certification to delete.

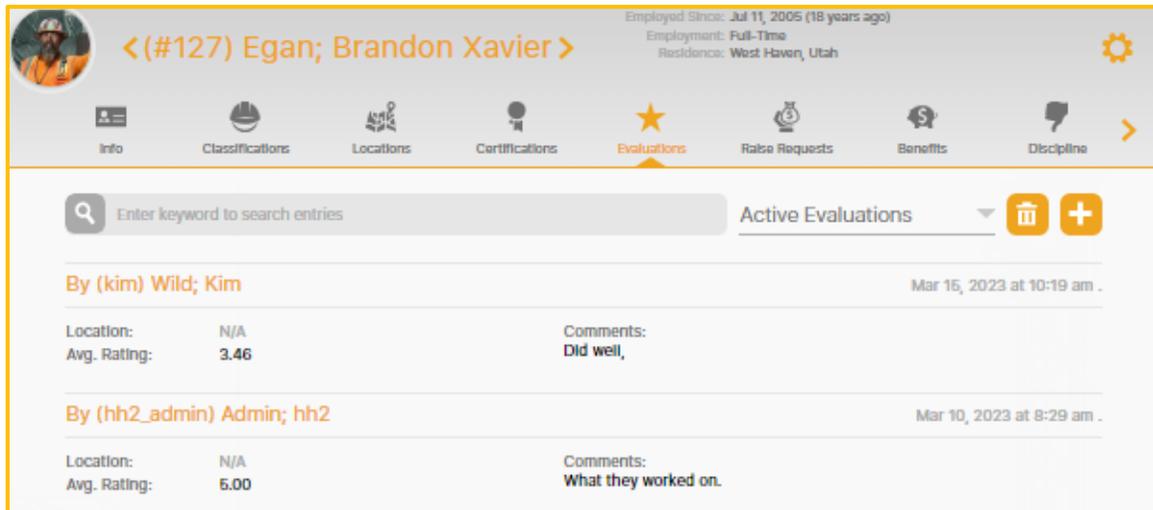


5. Select OK.
6. Select the Delete  icon to exit the delete mode.

## Evaluations Tab

The Evaluations tab stores employee evaluations. **Note:** There is no place for the employee to sign their evaluation online. Most companies print the evaluation, review it with the employee, have the employee sign it and then upload it into the system in the Documents tab.

**Navigation:** HR>General>Employee Records>specific employee>Evaluations tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.



The screenshot shows the 'Evaluations' tab for employee Brandon Xavier Egan. The header includes the employee's name, ID (#127), and a navigation menu with tabs for Info, Classifications, Locations, Certifications, Evaluations (active), Raise Requests, Benefits, and Discipline. Below the header is a search bar and a dropdown menu set to 'Active Evaluations'. Two evaluation entries are listed:

By (kim) Wild; Kim		Mar 15, 2023 at 10:19 am .
Location:	N/A	Comments:
Avg. Rating:	3.46	Did well,

By (hh2_admin) Admin; hh2		Mar 10, 2023 at 8:29 am .
Location:	N/A	Comments:
Avg. Rating:	5.00	What they worked on.

- Evaluations can be searched for using the Search field and sorted by Active Evaluations, Inactive Evaluations and All Evaluations.
- Evaluations may be added, edited, and deleted from this page.

## To Add Evaluations:

1. Navigate to HR>General>Employee Records>specific employee>Evaluations tab at the top of the Employee Record.
2. Select the Add  icon.



Rough Carpentry	
Forming Systems	
Other System	4.50
Architectural Forms Plywood with Cone Ties	4.00
Flying Form System	5.00
Alumiform System	4.00
Symons Forms-Hand-Set	4.25
Architectural Gang Forms	4.75
Symons Forms-Gang-Set	5.00
Concrete Finishing	
Curb and Gutter	No Rating
Residential / Small Commercial	No Rating
Architectural Finish	No Rating
Exposed Aggregate	No Rating
Slabs	No Rating
Stained	No Rating
Riding Trowel	No Rating
Site Concrete (Sidewalks or Drives)	No Rating
Walk Behind Trowels	No Rating
Large Commercial Flatwork	No Rating
Stamped	No Rating
Shoring	
Suspended Slabs Flat	No Rating

3. Add comments on the Add Employee Evaluation Page.
4. Hover the mouse and drag it to the appropriate score in the Rating field.
5. Select Save Evaluation at the bottom of the page (not pictured).

### To Edit Evaluations:

1. Navigate to HR>General>Employee Records>specific employee>Evaluations tab at the top of the Employee Record.
2. Click on a specific Evaluation to navigate to the Edit Employee Evaluation Page.

### Edit Employee Evaluation Close

Is This Evaluation Active  Yes

Comments  
Did well,

---

**Rough Carpentry**

---

Forming Systems

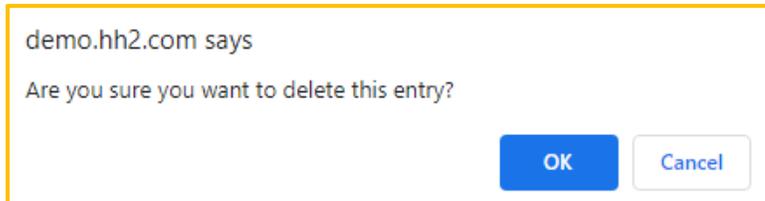
Other System	<div style="width: 100%;"></div>	5.00
Architectural Forms Plywood with Cone Ties	<div style="width: 75%;"></div>	3.75
Flying Form System	<div style="width: 100%;"></div>	5.00
Alumiform System	<div style="width: 75%;"></div>	3.25
Symons Forms-Hand-Set	<div style="width: 87.5%;"></div>	4.25
Architectural Gang Forms	<div style="width: 43.75%;"></div>	1.75
Symons Forms-Gang-Set	<div style="width: 21.875%;"></div>	1.25

3. Make modifications, as needed.
4. Select Close. The information will automatically save.

**Note:** Permissions must be granted for a user to modify evaluations beyond a 24 hour period. The permission for this is located in HR>Configuration>Security Groups> select the Security Group>Managers tab>select the Key  icon next to the user>Employee Evaluation-Edit Past 24 Hours. Check the box. Select Close.

### To Delete Evaluations:

1. Navigate to HR>General>Employee Records>specific employee>Evaluations tab at the top of the Employee Record.
2. Select the Delete  icon.
3. Delete icons will now display next to all Evaluations.
4. Select the Evaluation to delete.

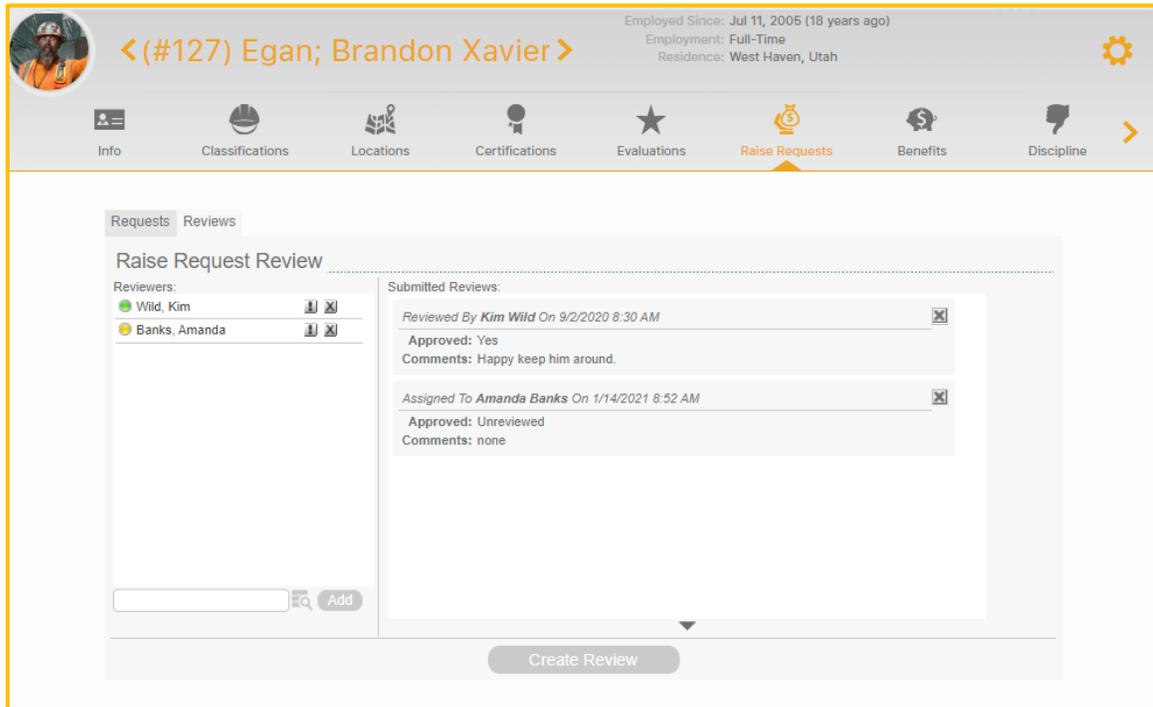


5. Select OK.
6. Select the Delete  icon to exit the delete mode.
7. The Evaluation will no longer be displayed on the employee's record.

## Raise Requests Tab

Raise Requests display in the Raise Request tab of the employee's record.

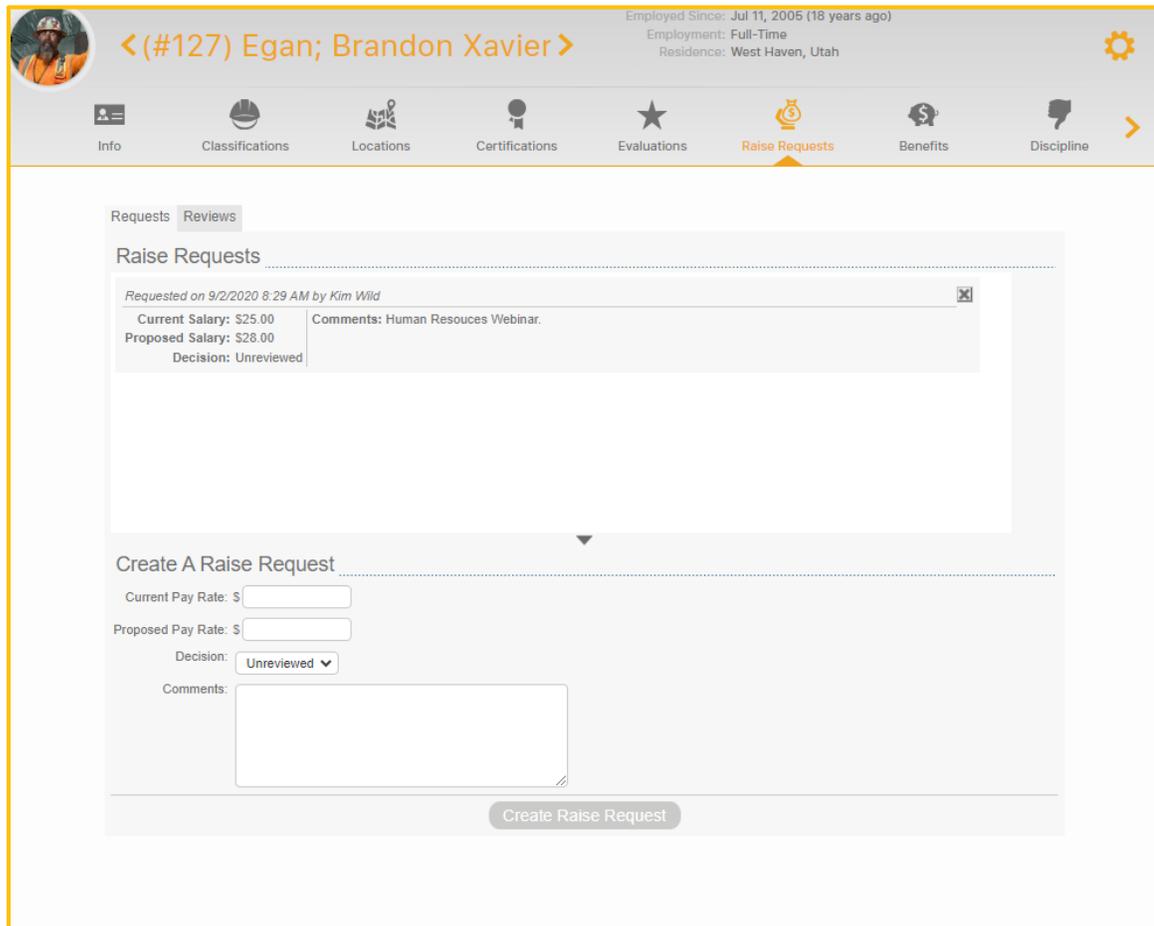
**Navigation:** HR>General>Employee Records>specific employee>Raise Request tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.



- Raise Requests can be added, edited, and reviewed by Reviewers.
- Reviewers may be removed and reminded to review.
- **Note:** Only those granted permissions may access the Raise Request tab. Permissions are granted in the HR>Configuration>Security Group>specific Security Group>Managers tab>Key  icon>Employee Raise Requests.

## To Create a Raise Request:

1. Navigate to HR>General>Employee Records>specific employee>Raise Request tab at the top of the Employee Record.
2. From the Requests tab, select Create Raise Request.



The screenshot shows the HR system interface for creating a raise request. At the top, the user's profile is displayed: <(#127) Egan; Brandon Xavier>. To the right, it shows employment details: Employed Since: Jul 11, 2005 (18 years ago), Employment: Full-Time, and Residence: West Haven, Utah. Below the profile is a navigation bar with icons for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests (highlighted), Benefits, and Discipline. The main content area is titled 'Raise Requests' and shows a list of requests. The first request is from 9/2/2020 8:29 AM by Kim Wild, with a current salary of \$25.00, a proposed salary of \$28.00, and a decision of Unreviewed. Below the list is a form titled 'Create A Raise Request' with fields for Current Pay Rate, Proposed Pay Rate, Decision (Unreviewed), and Comments. A 'Create Raise Request' button is at the bottom.

3. In the dropdown section that displays, enter the Current Pay Rate.
4. Enter the Proposed Pay Rate.
5. In the Decision Picklist, select Unreviewed, Approved or Declined.
6. Enter any comments in the Comments section.
7. Select Create Raise Request once more.
8. Select the Reviews tab.
9. Select the Magnifying  icon to choose Reviewers for the request.



10. Select the Reviewer with a click and Close.
11. Select Add.
12. Repeat steps 10 and 11 to add additional Reviewers.
13. Reviewers will be sent an email notification.
14. The Date and Time stamp displays on the Reviews tab.

#### To Remove a Reviewer:

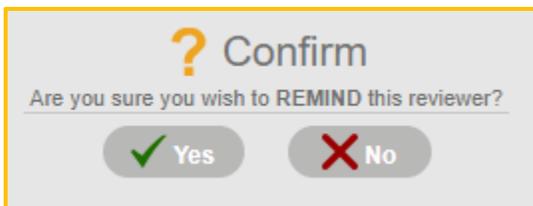
1. Select the X next to the Reviewer's name.



2. Select Yes.

#### To Remind the Reviewer:

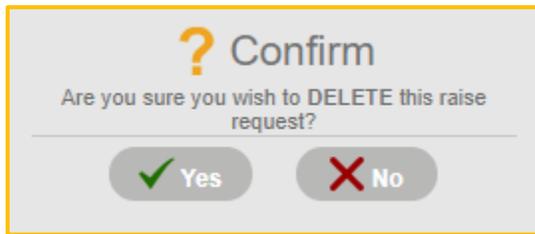
1. Select ! next to the Reviewer's name.



2. Select Yes.

### To Delete a Raise Request:

1. Select the X in the upper right corner of the Requests tab (light colored tab).



2. Select Yes.

### To Delete a Raise Review:

1. Select the X in the upper right corner of the Reviews tab (light colored tab).



2. Select Yes. **Note:** Archive is equivalent to delete, and will permanently delete the Raise Review.

## Benefits Tab

The Benefits tab displays the employee's benefits.

**Navigation:** HR>General>Employee Records>specific employee>Benefits tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.

The screenshot shows the 'Benefits' tab for employee Brandon Xavier Egan. The interface includes a navigation bar with icons for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits (selected), and Discipline. Below the navigation bar is a search field and a dropdown menu set to 'Active Benefits'. The main content area displays four benefit categories, each with a table of details and a 'Comments' field.

Health Insurance		Modified By (kim) Wild; Kim on Dec 04, 2023 at 8:48 am .
Rate:	Family	Comments: None
Enrolled:	Nov 18, 2022	
Effective:	Nov 18, 2022	
Expires:	N/A	

Life Insurance Spouse		Modified By (kim) Wild; Kim on Aug 30, 2021 at 9:19 am .
Rate:	Standard	Comments: None
Enrolled:	Aug 01, 2022	
Effective:	Nov 12, 2020	
Expires:	N/A	

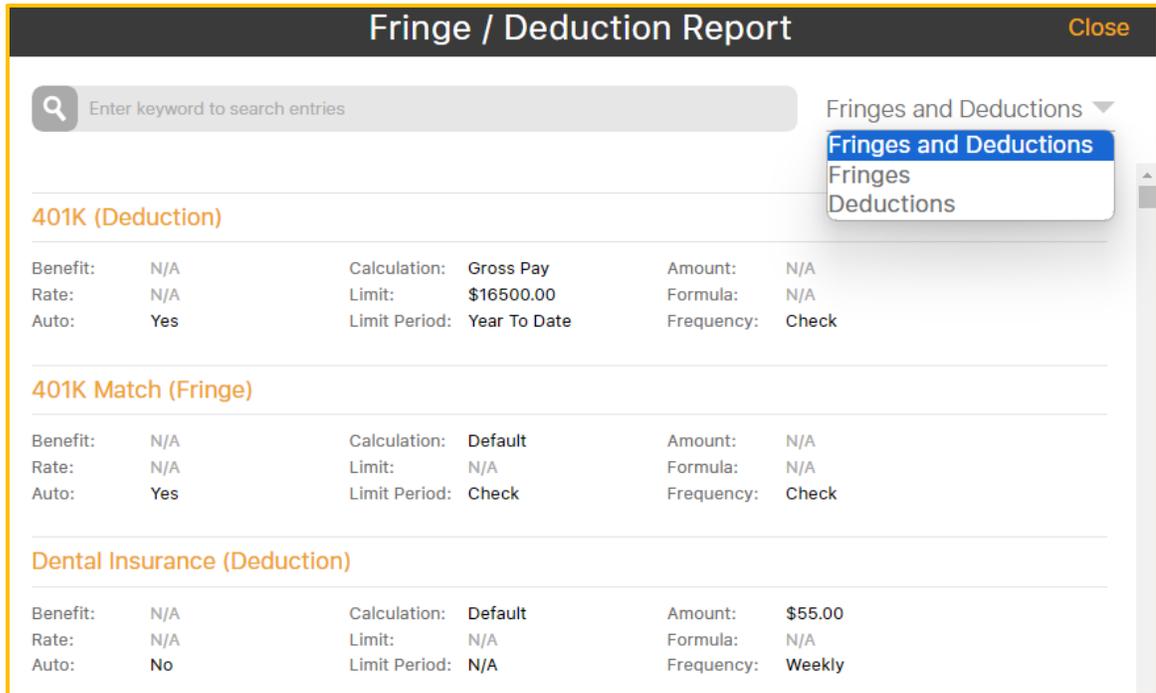
Disability Short Term		Modified By (kim) Wild; Kim on Mar 04, 2020 at 9:36 am .
Rate:	Standard	Comments: None
Enrolled:	Mar 04, 2020	
Effective:	Mar 04, 2020	
Expires:	N/A	

401K		Modified By (hh2_admin) Admin; hh2 on Apr 23, 2020 at 12:25 pm .
Rate:	401K Percentage	Comments: None
Enrolled:	Jan 15, 2018	
Effective:	Jan 15, 2018	
Expires:	Jun 05, 2025	

- The Benefits tab is only compatible with Sage 300 CRE. Other accounting systems do not synchronize.
- Separated benefits such as Health, Dental, and Life are supported. However, benefits grouped together into one category are not supported with this feature.
- Additions and modifications to benefits must be done in hh2 and synchronized to the accounting system, not the other way around.
- Benefits may be searched using the Search field and sorted using the Active Benefits Picklist (Active, Conflicted, Inactive and All Benefits).
- Benefits may be added, edited, and deleted.
- Fringes and deductions may be viewed, as well as employee benefit eligibility.

### To View Fringes and Deductions Assigned to the Employee:

1. Navigate to HR>General>Employee Records>specific employee>Benefits tab at the top of the Employee Record.
2. Select the List  icon.



401K (Deduction)	
Benefit:	N/A
Rate:	N/A
Auto:	Yes
Calculation:	Gross Pay
Limit:	\$16500.00
Limit Period:	Year To Date
Amount:	N/A
Formula:	N/A
Frequency:	Check

401K Match (Fringe)	
Benefit:	N/A
Rate:	N/A
Auto:	Yes
Calculation:	Default
Limit:	N/A
Limit Period:	Check
Amount:	N/A
Formula:	N/A
Frequency:	Check

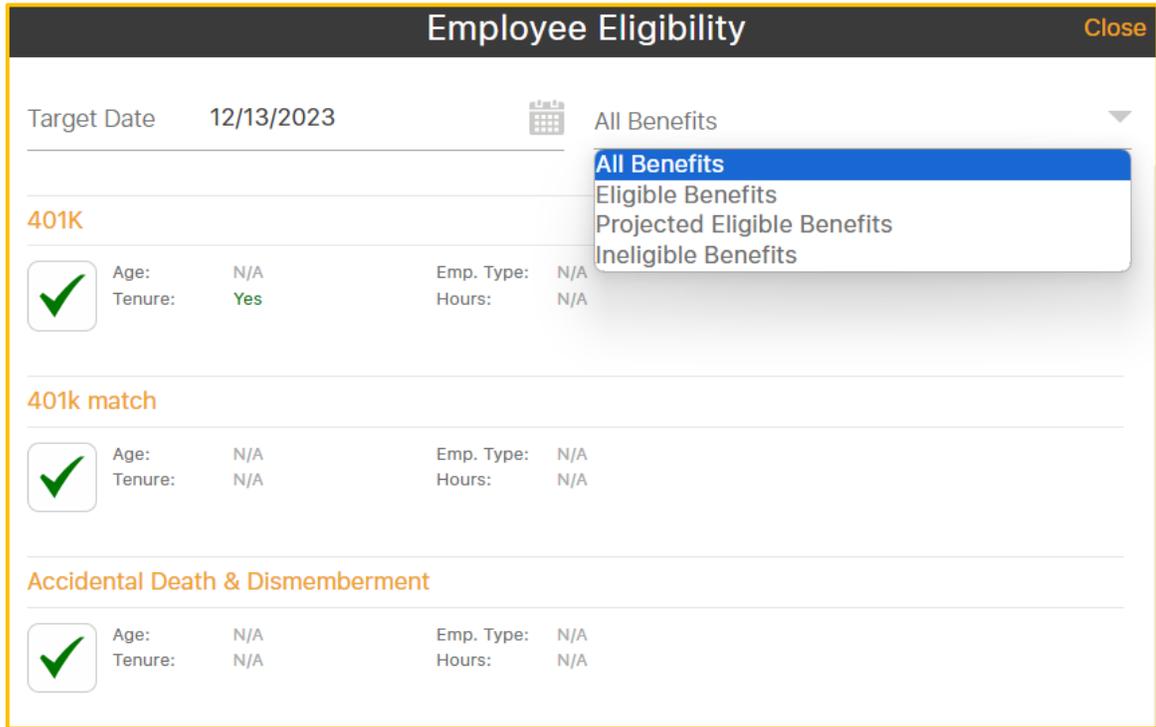
  

Dental Insurance (Deduction)	
Benefit:	N/A
Rate:	N/A
Auto:	No
Calculation:	Default
Limit:	N/A
Limit Period:	N/A
Amount:	\$55.00
Formula:	N/A
Frequency:	Weekly

3. Either use the Search Field or the Picklist to find or sort data.
4. The related Fringe and/or Deduction data will be displayed for the employee.
5. Select Close.

**To View Employee Benefit Eligibility:**

1. Navigate to HR>General>Employee Records>specific employee>Benefits tab at the top of the Employee Record.
2. Select the Eligibility  icon.



**Employee Eligibility** Close

Target Date 12/13/2023  All Benefits 

- All Benefits
- Eligible Benefits
- Projected Eligible Benefits
- Ineligible Benefits

**401K**

	Age: N/A	Emp. Type: N/A
	Tenure: Yes	Hours: N/A

**401k match**

	Age: N/A	Emp. Type: N/A
	Tenure: N/A	Hours: N/A

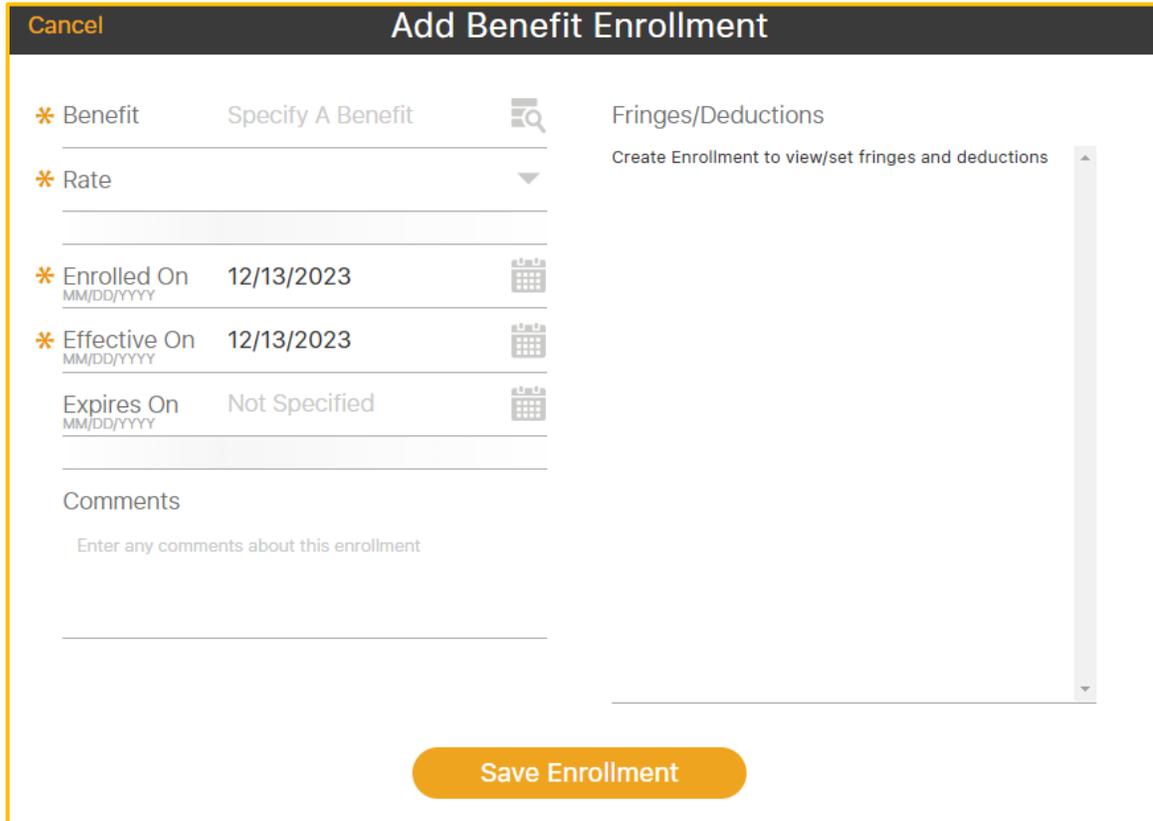
**Accidental Death & Dismemberment**

	Age: N/A	Emp. Type: N/A
	Tenure: N/A	Hours: N/A

3. Select a Target Date using the calendar.
4. Use the Picklist to filter Benefits by All, Eligible, Projected Eligible, or Ineligible.
5. Benefits will be displayed accordingly.

### To Add a Benefit:

1. Navigate to HR>General>Employee Records>specific employee>Benefits tab at the top of the Employee Record.
2. Select Add  icon.



**Cancel** **Add Benefit Enrollment**

\* Benefit Specify A Benefit  Fringes/Deductions

\* Rate  Create Enrollment to view/set fringes and deductions

\* Enrolled On 12/13/2023  MM/DD/YYYY

\* Effective On 12/13/2023  MM/DD/YYYY

Expires On Not Specified  MM/DD/YYYY

Comments

Enter any comments about this enrollment

**Save Enrollment**

3. Use the Magnifying  icon to select the benefit.
4. Enter the Rate. The Rate Picklist will vary based on the benefit.
5. Enter the Enrolled On, Effective On and Expires On Dates using the calendars.
6. Enter any comments in the Comments section.
7. Select Save Enrollment.

8. The benefit will be displayed in the Fringes/Deductions column.

**Add Benefit Enrollment** Close

* Benefit	Vision	
* Rate	Family	
* Enrolled On	12/13/2023	
* Effective On	12/13/2023	
Expires On	Not Specified	

Comments  
Enter any comments about this enrollment

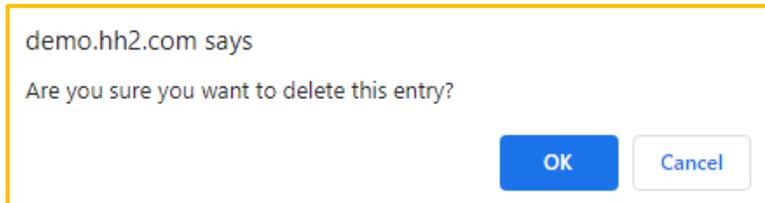
**Fringes/Deductions**

Vision Insurance  
DE Amount: \$15.91  
Auto: Yes

9. Select Close.
10. The benefit will also be displayed on the Fringes/Deductions Report and the Employee Eligibility Pages.

### To Delete a Benefit:

1. Navigate to HR>General>Employee Records>specific employee>Benefits tab at the top of the Employee Record.
2. Select the Delete  icon.
3. Delete icons will now display next to all Benefits.
4. Select the Benefit to delete.



5. Select OK.
6. Select the Delete  icon to exit the delete mode.
7. The Benefit will no longer be displayed on the employee's record.

## Discipline Tab

The Discipline tab houses any discipline records for an employee.

**Navigation:** HR>General>Employee Records>specific employee>Discipline tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.

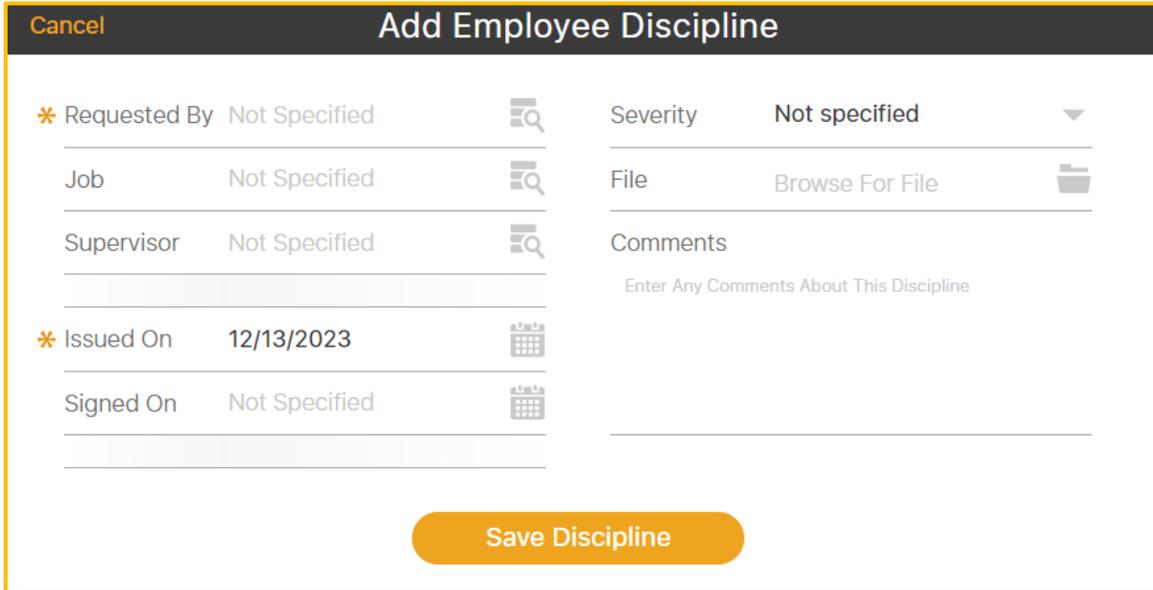
The screenshot shows the Discipline tab for employee Brandon Xavier Egan. The header includes the employee's name, ID (#127), and a navigation menu with icons for Info, Classifications, Locations, Certifications, Evaluations, Raise Requests, Benefits, and Discipline. The Discipline tab is active, showing a search bar and a list of active disciplines. Two records are visible:

Date	Modified By	Requested By	Job	Supervisor	Signed	Severity	Comments
Feb 23, 2023	(kim) Wild; Kim on Feb 23, 2023 at 9:53 am	(#133) Banks; Amanda S	(#00.03.202) Large High School	(#160) Beaman; Blake	N/A	High	Repeatedly no-showed this job.
Jun 03, 2022	(kim) Wild; Kim on Jun 03, 2022 at 2:25 pm	(#133) Banks; Amanda S	(#00.100) Elementry School	(#133) Banks; Amanda S	Jun 03, 2022	High	Human Resources Webinar Referral

- The Discipline record is time and data stamped. Severity of the offense and comments can be made.
- The Discipline record tracks who requested it, the job and supervisor name.
- The construction company will process disciplines wherein employees sign and date a paper discipline form, which is then uploaded into the hh2 system.
- There is no capability for discipline signature recording in the hh2 system. However, the written paper form can be stored in the Discipline tab as an attachment.
- To provide employee access to the discipline record, the Administrator may navigate to the Documents tab>choose the employee, select on the Discipline Class Picklist, and upload the discipline record there. The employee can then view it from My Records>Documents.
- Discipline records can be added, edited, and deleted.

### To Add a Discipline to the Employee's Record:

1. Navigate to HR>General>Employee Records>specific employee>Discipline tab at the top of the Employee Record.
2. Select Add  icon.



3. Enter the Requested by name, using the Magnifying  icon.
4. Select a Job.
5. Select a Supervisor.
6. Select an Issued-On Date using the calendar.
7. Select a Signed-On Date using the calendar.
8. Select a Severity from the Picklist (Not Specified, Low, Medium, or High).
9. Upload a file, if necessary. Select the Folder  icon, select the file, then Open.
10. Enter any comments.
11. Select Save Discipline.
12. The record will be date and time stamped with the requestor's name.

**To Edit a Discipline:**

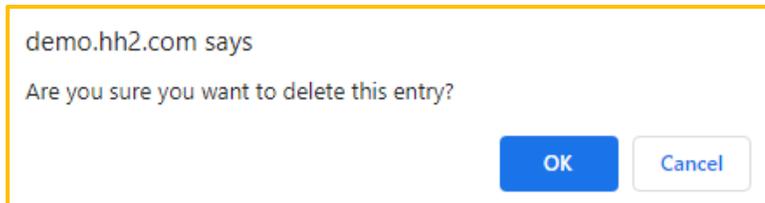
1. Navigate to HR>General>Employee Records>specific employee>Discipline tab at the top of the Employee Record.
2. Click on the Discipline.

Edit Employee Discipline		Close
* Requested By	(#133) Banks; Amanda S	Severity High
Job	(#00.03.202) Large High	File Browse To Change File
Supervisor	(#160) Beaman; Blake	Comments Repeatedly no-showed this job.
* Issued On	02/23/2023	
Signed On	Not Specified	
Is Active	<input checked="" type="checkbox"/> Yes	

3. Make the necessary modifications on the Edit Employee Discipline Page.
4. Select Close. The information will automatically save.

### To Delete a Discipline:

1. Navigate to HR>General>Employee Records>specific employee>Discipline tab at the top of the Employee Record.
2. Select the Delete  icon.
3. Delete icons will now display next to all Disciplines.
4. Select the Discipline  to delete.

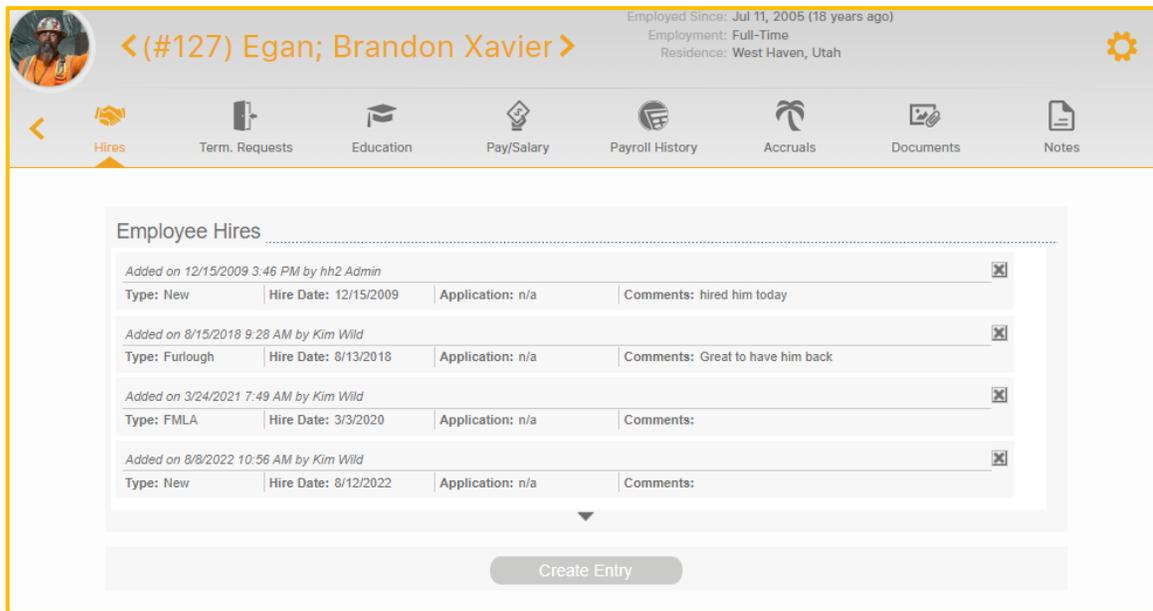


5. Select OK.
6. Select the Delete  icon to exit the delete mode.
7. The Discipline will no longer be displayed on the employee's record.

## Hires Tab

The Hires tab is a place in the employee's record to track hire dates, FLMA, Military Leave (Active Duty), Leave of Absences and Furloughs.

**Navigation: HR>General>Employee Records>specific employee>Hires tab at the top of the Employee Record. Note:** The user may have to scroll to view some tabs.



The screenshot shows the 'Hires' tab for employee Brandon Xavier Egan (#127). The interface includes a navigation bar with icons for Hires, Term. Requests, Education, Pay/Salary, Payroll History, Accruals, Documents, and Notes. The main content area displays a table of hire entries with columns for Type, Hire Date, Application, and Comments. A 'Create Entry' button is located at the bottom of the table.

Employee Hires			
Added on 12/15/2009 3:46 PM by hh2 Admin			
Type: New	Hire Date: 12/15/2009	Application: n/a	Comments: hired him today
Added on 8/15/2018 9:28 AM by Kim Wild			
Type: Furlough	Hire Date: 8/13/2018	Application: n/a	Comments: Great to have him back
Added on 3/24/2021 7:49 AM by Kim Wild			
Type: FMLA	Hire Date: 3/3/2020	Application: n/a	Comments:
Added on 8/8/2022 10:56 AM by Kim Wild			
Type: New	Hire Date: 8/12/2022	Application: n/a	Comments:

- Employee Hires may be created, edited, and deleted.

## To Create a Hire:

1. Navigate to HR>General>Employee Records>specific employee>Hires tab at the top of the Employee Record.
2. Select Create Entry.

Employee Hires

Type	Hire Date	Application	Comments
New	12/15/2009	n/a	hired him today
Furlough	8/13/2018	n/a	Great to have him back
FMLA	3/3/2020	n/a	
New	8/12/2022	n/a	

Add An Entry

Type: [select a type] Hire Date: [calendar icon] Comments: [text input]

Create Entry

3. Enter the Type from the Picklist.
4. Enter the Hire Date.
5. Enter any Comments.
6. Select Create Entry once more.

### To Edit a Hire:

1. Navigate to HR>General>Employee Records>specific employee>Hires tab at the top of the Employee Record.
2. Click on the Hire.
3. Make any necessary changes to the Type, Hire Date, or Comments in the fields that display.



4. Select Finished.

### To Delete a Hire:

1. Navigate to HR>General>Employee Records>specific employee>Hires tab at the top of the Employee Record.
2. Select the X next to the Hire. **Note:** Archive is equivalent to a permanent delete.
3. Select Yes.

## Termination Request Tab

Termination Requests are displayed in the Termination Request tab of the employee's record. From here, Termination Requests can be added and reviewed by Reviewers.

**Navigation:** HR>General>Employee Records>specific employee>Termination Request tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.

The screenshot shows the HR system interface for employee Brandon Xavier (#127). The top navigation bar includes tabs for Hires, Term. Requests (highlighted), Education, Pay/Salary, Payroll History, Accruals, Documents, and Notes. The main content area displays a 'Termination Requests' section with a single request card. The card shows the request was made on 1/8/2020 at 8:41 AM by Kim Wild. The location is (00.03.202) Large High School and the current salary is \$72000.00. The decision is 'Approved' and the employee would be rehired. A comment states: 'We needed to cut down on field employees during the slow season and this employee seemed like the most likely candidate'. A 'Create Termination Request' button is visible at the bottom of the card.

- Termination Requests may be added, edited, and deleted.
- Reviewers of Termination Requests may be added, removed, or reminded.
- Reviewers may Create Reviews.
- **Note:** Only those granted permissions may access the Termination Request tab. The user will need the Security Group password for which the employee is affiliated.

## To Create a Termination Request:

1. Navigate to HR>General>Employee Records>specific employee>Termination Request tab at the top of the Employee Record.
2. Select Create Termination Request.

The screenshot shows the 'Termination Requests' form for employee Brandon Xavier. The form is divided into two main sections: 'Termination Requests' and 'Reasons for Termination'.

**Termination Requests Section:**

- Requested on: 1/8/2020 8:41 AM by Kim Wild
- Location: (00.03.202) Large High School
- Current Salary: \$72000.00
- Decision: Approved
- Would Rehire: Yes
- Comments: We needed to cut down on field employees during the slow season and this employee seemed like the most likely candidate

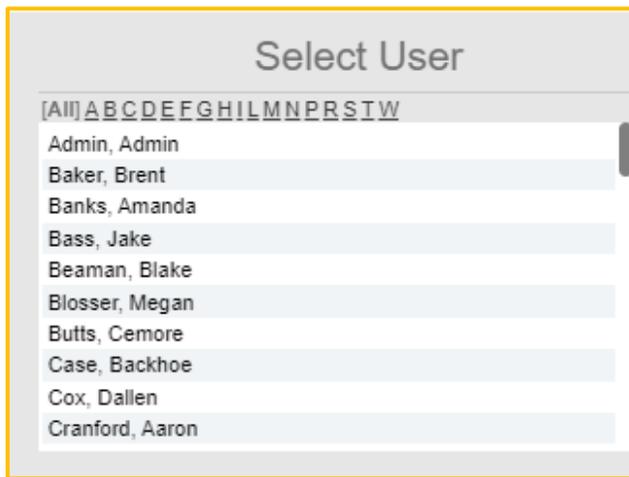
**Reasons for Termination Section:**

- Job/Extra: [Text input field]
- Current Salary: \$ [Text input field]
- Would Rehire:
- Requested By: Wild, Kim
- Decision: Unreviewed (dropdown menu)
- Comments: [Text area]

A 'Create Termination Request' button is located at the bottom of the form.

3. Working from the Requests tab, select the Job/Extra using the Magnifying  icon.
4. Enter the Current Salary.
5. Check Would Rehire if the construction company would rehire this employee, otherwise leave unchecked.
6. Select the Requested By, using the Magnifying  icon.
7. Select Unreviewed, Approved or Declined from the Picklist next to the Decision Field.
8. Enter Comments, as needed.
9. The Termination Request will be displayed in the Requests Tab.

10. Select the Reviews tab to add Reviewers.
11. Select the Magnifying  icon to choose Reviewers.



12. Select the Reviewer with a click and Close.
13. Select Add.
14. Repeat steps 11 and 13 to add additional Reviewers.
15. Reviewers will be sent an email notification.
16. The Date and Time stamp displays on the Reviews tab.

**To Edit a Termination Request:**

1. Navigate to HR>General>Employee Records>specific employee>Termination Request tab at the top of the Employee Record.
2. Click on the Requests tab.
3. Make any necessary changes.
4. Select Finished.

**To Delete a Termination Request:**

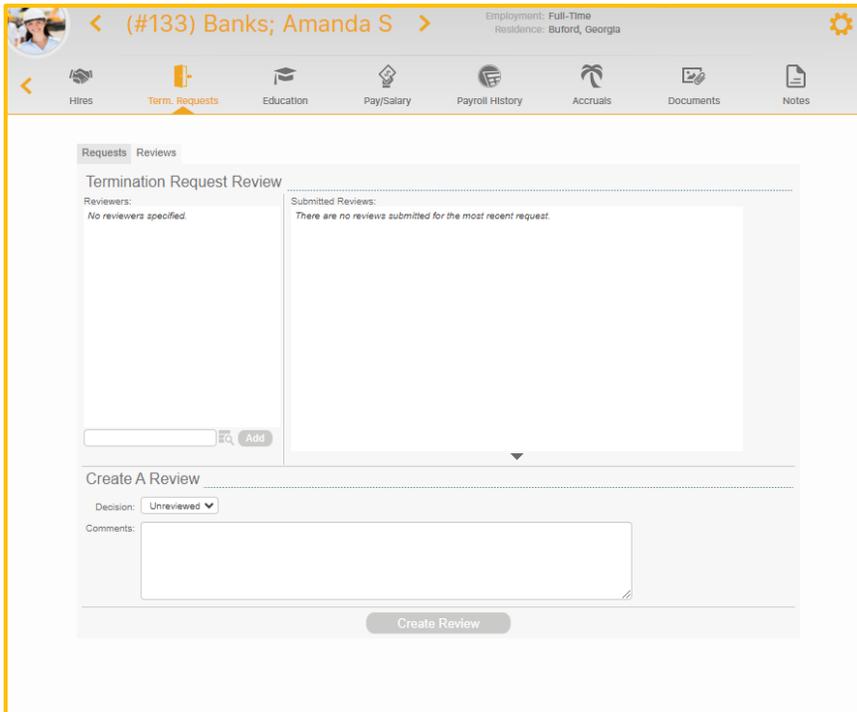
1. Navigate to HR>General>Employee Records>specific employee>Termination Request tab at the top of the Employee Record.
2. Click on the Requests tab.
3. Select the X next to the Termination Request.



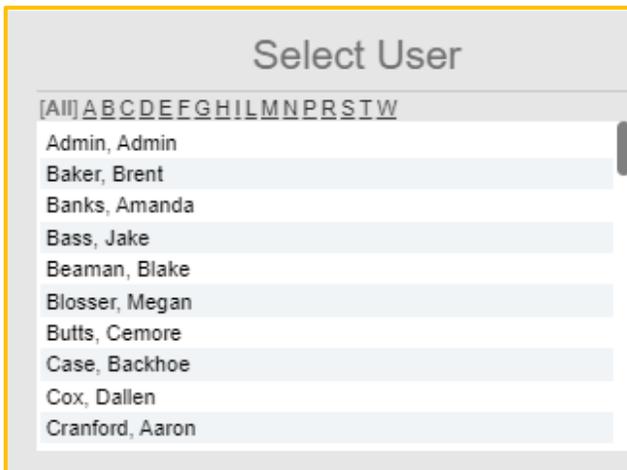
4. Select Yes.

## To Add a Reviewer (at a time other than Creation of a Termination Request):

1. To add a termination reviewer for the employee, navigate to HR>General>Employee Records>specific employee>Termination Request tab at the top of the Employee Record.



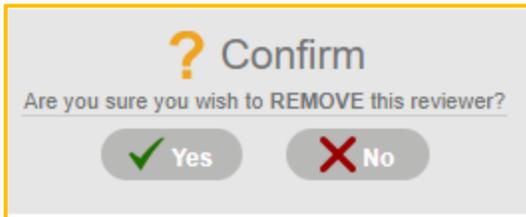
2. Select the Reviews tab.
3. Select the Magnifying  icon to choose Reviewers for the request.



4. Select the Reviewer with a click and Close.
5. Select Add.
6. Repeat steps 3 through 5 to add additional Reviewers.

### To Remove a Reviewer:

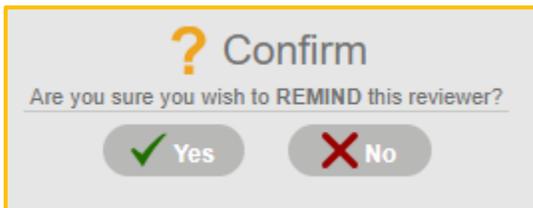
1. Navigate to HR>General>Employee Records>specific employee>Termination Request tab at the top of the Employee Record.
2. Select the Reviews tab of the specific Request.
3. Select the X next to the Reviewer's name.



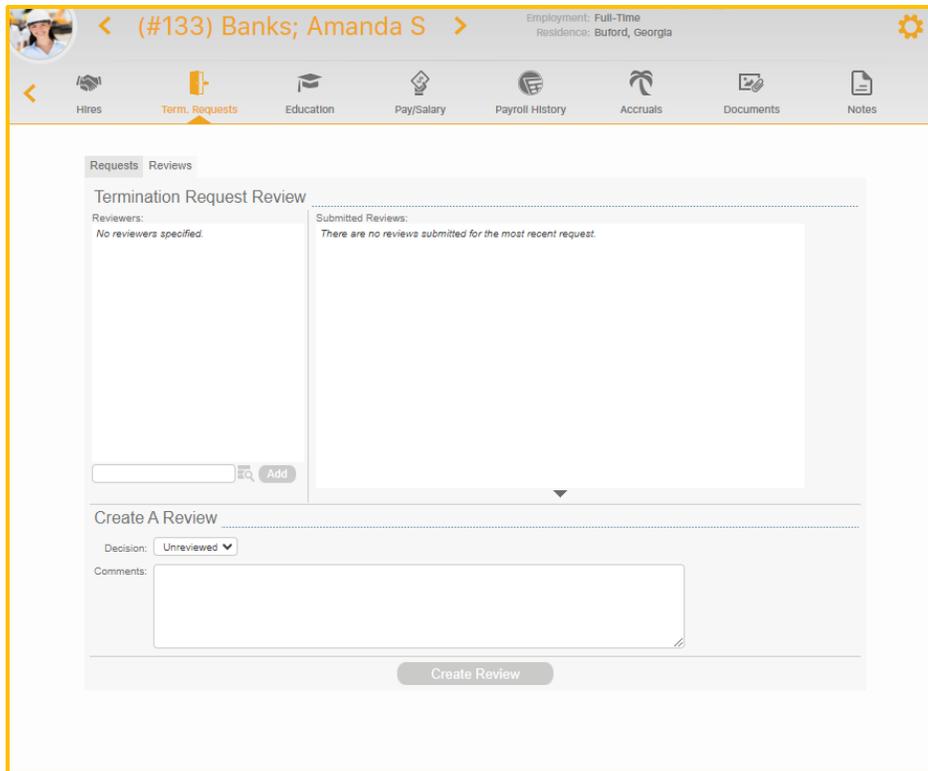
4. Select Yes.

### To Remind the Reviewer:

1. Navigate to HR>General>Employee Records>specific employee>Termination Request tab at the top of the Employee Record.
2. Select the Reviews tab of the specific Request.
3. Select ! next to the Reviewer's name.



4. Select Yes.



### To Add a Termination Review:

This is the process the reviewer will use.

1. Navigate to HR>General>Employee Records>specific employee>Termination Request tab at the top of the Employee Record.
2. Select the Reviews tab.
3. Select Create Review.
4. Select a Decision from the Picklist.
5. Enter Comments.
6. Select Create Review once more.

## Education

The Education tab provides a space to store employee education records.

**Navigation: HR>General>Employee Records>specific employee>Education tab at the top of the Employee Record. Note:** The user may have to scroll to view some tabs.

Employee Education

Added on 4/25/2008 5:37 PM by Unknown User

Dates: From n/a To n/a Type: High School	Degree Type: Degree:	Comments:
Institution: Imagine High School Location: Fable, CA	Graduated: Yes Graduation Date: n/a	

Added on 4/25/2008 5:37 PM by Unknown User

Dates: From n/a To n/a Type: Trade School	Degree Type: Degree: Journeyman	Comments:
Institution: Imagine Vocational School Location: Fable, CA	Graduated: Yes Graduation Date: n/a	

Create Entry

- The hh2 system does not store phases of education.
- Educational records can be created and deleted.

## To Create an Education Entry:

1. Navigate to HR>General>Employee Records>specific employee>Education tab at the top of the Employee Record.

The screenshot shows the 'Employee Education' page for Brandon Xavier Egan. The header includes the employee's name, ID (#127), and a navigation menu with tabs for Hires, Term. Requests, Education (selected), Pay/Salary, Payroll History, Accruals, Documents, and Notes. The page displays two existing education entries:

Employee Education		
Added on 4/25/2008 5:37 PM by Unknown User		
Dates: From n/a To n/a Type: High School	Degree Type: Degree:	Comments:
Institution: Imagine High School Location: Fable, CA	Graduated: Yes Graduation Date: n/a	
Added on 4/25/2008 5:37 PM by Unknown User		
Dates: From n/a To n/a Type: Trade School	Degree Type: Degree: Journeyman	Comments:
Institution: Imagine Vocational School Location: Fable, CA	Graduated: Yes Graduation Date: n/a	

At the bottom of the page is a 'Create Entry' button.

2. Select Create Entry.

This screenshot shows the same 'Employee Education' page, but with the 'Add An Entry' form expanded at the bottom. The form contains the following fields:

- Type: [select a type] (dropdown)
- Dates: [ ] [ ] (calendar icons)
- Institution: [ ] (text input)
- Location: [ ] (text input)
- Degree Type: [Select a degree] (dropdown)
- Degree Field: [ ] (text input)
- Graduated:
- Graduation Date: [ ] [ ] (calendar icons)
- Comments: [ ] (text area)

A 'Create Entry' button is located at the bottom of the form.

3. Enter the type of education in the Type field.
4. Enter the Date Range by selecting the Calendar in the Dates Field. Select Apply.
5. Enter the Institution in the Institution field.
6. Enter the Location in the Location field.
7. Select the Degree Type from the Picklist.
8. Enter the degree in the Degree Field.
9. Check Graduated, if Graduated.
10. Select a Graduation Date.
11. Enter Comments, if necessary.
12. The Education entry will be at the bottom of the employee's educational record.

**To Delete an Educational Entry:**

1. Navigate to HR>General>Employee Records>specific employee>Education tab at the top of the Employee Record.
2. Select the X next to the Education Record. **Note:** Archive is equivalent to a permanent delete.
3. Select Yes to confirm.

## Pay/Salary Tab

Provides the user with the ability to view pay information by Pay Type for each employee.

**Navigation:** HR>General>Employee Records>specific employee>Pay/Salary tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.

Employee Information: **< (#127) Egan; Brandon Xavier >**  
Employed Since: Jul 11, 2005 (18 years ago)  
Employment: Full-Time  
Residence: West Haven, Utah

Navigation: Hires, Term. Requests, Education, **Pay/Salary**, Payroll History, Accruals, Documents, Notes

Search: Enter keyword to search entries | Active Pay Types

**(#1) Regular HRLY** Modified By (kim) Wild; Kim on Sep 28, 2021 at 9:38 am .

Amount:	<b>\$23.00</b>	Period:	N/A	Past Amounts:	\$21.00 Mar 24, 2021 To Mar 24, 2021
Effective:	Sep 28, 2021	Frequency:	Weekly		\$23.00 Mar 23, 2021 To Mar 24, 2021
Expires:	Sep 28, 2021	Calculation:	Default		\$30.00 Mar 23, 2021 To Mar 24, 2021
Limit:	N/A				\$28.00 Mar 23, 2021 To Mar 24, 2021
Automatic:	Yes				\$20.00 Mar 02, 2021 To Mar 24, 2021
					\$22.00 Jul 31, 2019 To Dec 08, 2019
					\$19.50 Feb 22, 2019
					\$18.50 Feb 09, 2019
					\$18.00 Jun 30, 2018
					\$24.25 Mar 07, 2018
					\$24.50 Mar 06, 2018
					\$24.00 Dec 31, 2015 To Mar 05, 2016

**(#2) Overtime 1.5** Modified By (hh2\_admin) Admin; hh2 on Mar 07, 2018 at 9:02 am .

Amount:	<b>\$36.00</b>	Period:	N/A	Past Amounts:	\$36.25 Date range not specified.
Effective:	Not Specified	Frequency:	Weekly		\$33.00 Date range not specified.
Expires:	Not Specified	Calculation:	Flat Amount		
Limit:	N/A				
Automatic:	Yes				

**(#SCKACC) Sick Accruing** Modified By (hh2\_admin) Admin; hh2 on Jun 01, 2010 at 4:43 pm .

Amount:	<b>\$0.00</b>	Period:	N/A	Past Amounts:	None
Effective:	Not Specified	Frequency:	N/A		
Expires:	Not Specified	Calculation:	N/A		
Limit:	N/A				
Automatic:	Yes				

**(#VACACC) Vacation Accruing** Modified By (hh2\_admin) Admin; hh2 on Mar 09, 2022 at 1:04 pm .

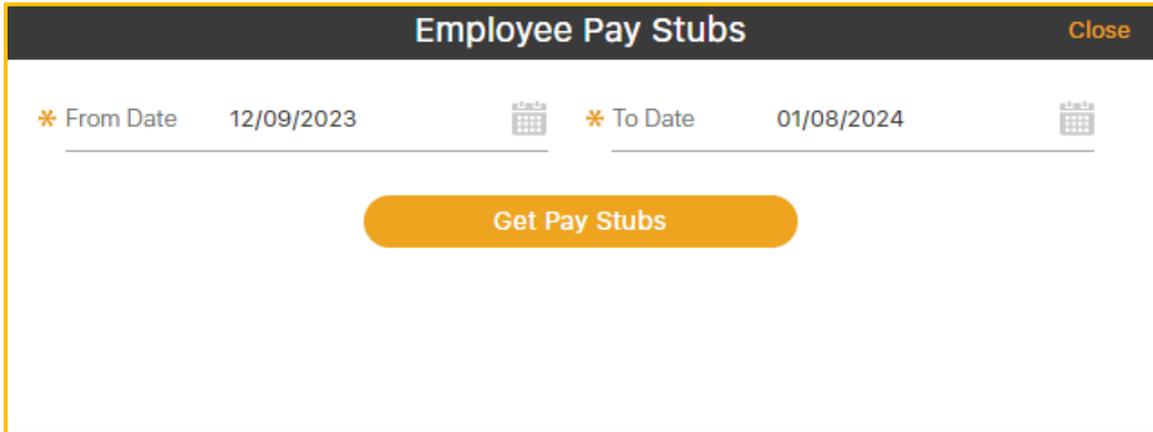
Amount:	<b>\$120.00</b>	Period:	N/A	Past Amounts:	\$0.00 To Mar 09, 2022
Effective:	Jan 31, 2022	Frequency:	Annually		
Expires:	Not Specified	Calculation:	Total Hours		
Limit:	N/A				
Automatic:	Yes				

From the Pay/Salary tab, the following actions can be performed:

- Searches for Pay Types using the Search field.
- Filtering by Active Pay Types, Inactive Pay Types, and All Pay Types using the dropdown Picklist.
- Viewing employee pay stub information.
- Comparing employee salary averages with market averages on Indeed.com.
- Adding Pay Type information.
- Deleting Pay Type information for the employee.

### To View Employee Pay Stubs:

1. Navigate to HR>General>Employee Records>specific employee>Pay/Salary tab at the top of the Employee Record.
2. Select the Pay Stub  icon.



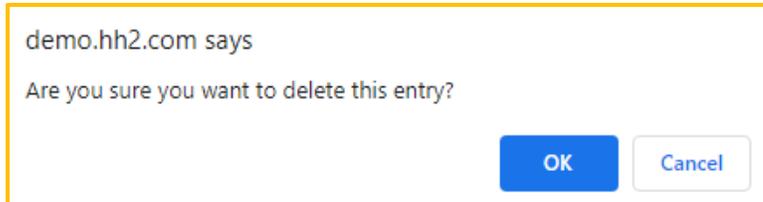
3. Select the Date Range using the calendar.
4. Select Get Pay Stubs.
5. Select Download Pay Stubs.
6. The Pay Stubs will display in the user's download folder.

### To Compare Employee Salary Averages with Market Averages:

1. Navigate to HR>General>Employee Records>specific employee>Pay/Salary tab at the top of the Employee Record.
2. Select the Indeed  icon.
3. This redirects the user to Indeed.com where salaries may be reviewed.

### To Delete Pay Type Information for the Employee:

1. Navigate to HR>General>Employee Records>specific employee>Pay Salary tab at the top of the Employee Record.
2. Select the Delete  icon.
3. Delete icons will now display next to all Pay Types.
4. Select the Pay Type information to delete.

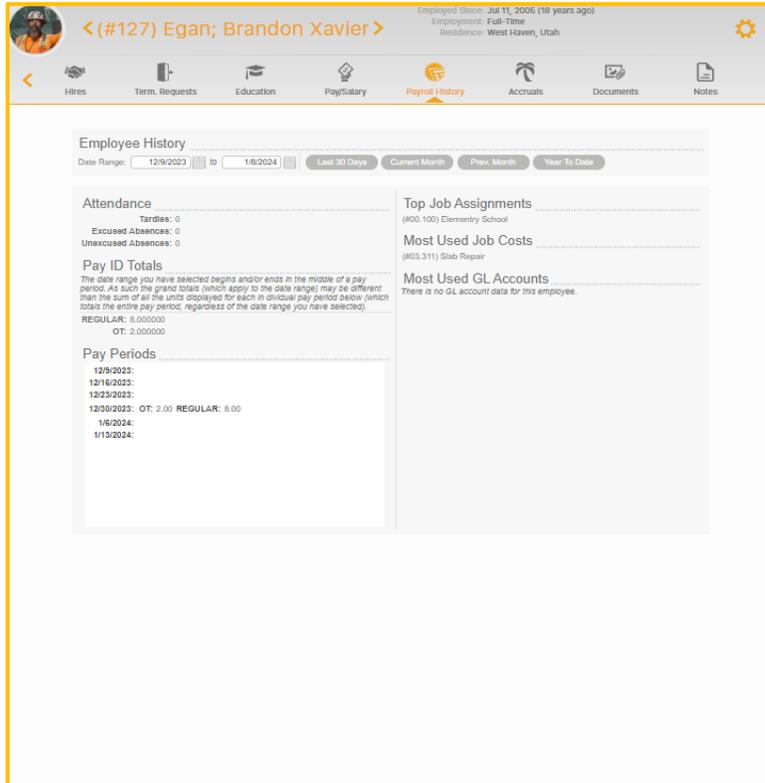


5. Select OK.
6. Select the Delete  icon to exit the delete mode.
7. The Pay Type information will no longer be displayed on the employee's record.

## Payroll History Tab

The Payroll History Tab displays employee payroll history by selected date ranges, last 30 days, current month, previous month, and year to date.

**Navigate to HR>General>Employee Records>specific employee>Payroll History tab at the top of the Employee Record. Note:** The user may have to scroll to view some tabs.



The following information displays:

- Attendance
- Pay ID Totals
- Pay Periods Top Job Assignment
- Most Used Cost Codes
- Most Used GL Accounts

### To View Payroll History:

1. Navigate to HR>General>Employee Records>specific employee>Payroll History tab at the top of the Employee Record.
2. Select the time frame to display payroll data.

## Accruals Tab

Within the Accrual Tab, employees or managers can view the accrued time. Alternatively, employees can view this information from the Pay Stubs or Remote Payroll mobile apps.

**Navigation: Navigate to HR>General>Employee Records>specific employee>Accruals tab at the top of the Employee Record. Note:** The user may have to scroll to view some tabs.

Employee Information	
Employed Since:	May 11, 2008 (16 years ago)
Employment:	Part-Time
Residence:	Beaverton, OR

Navigation	
PaySalary	Accruals

Search and Filter	
Enter keyword to search entries	Active Accruals

(#U_VAC) Union Vacation	
Total Accrued:	0.00
Total Spent:	0.00
Total Remaining:	0.00

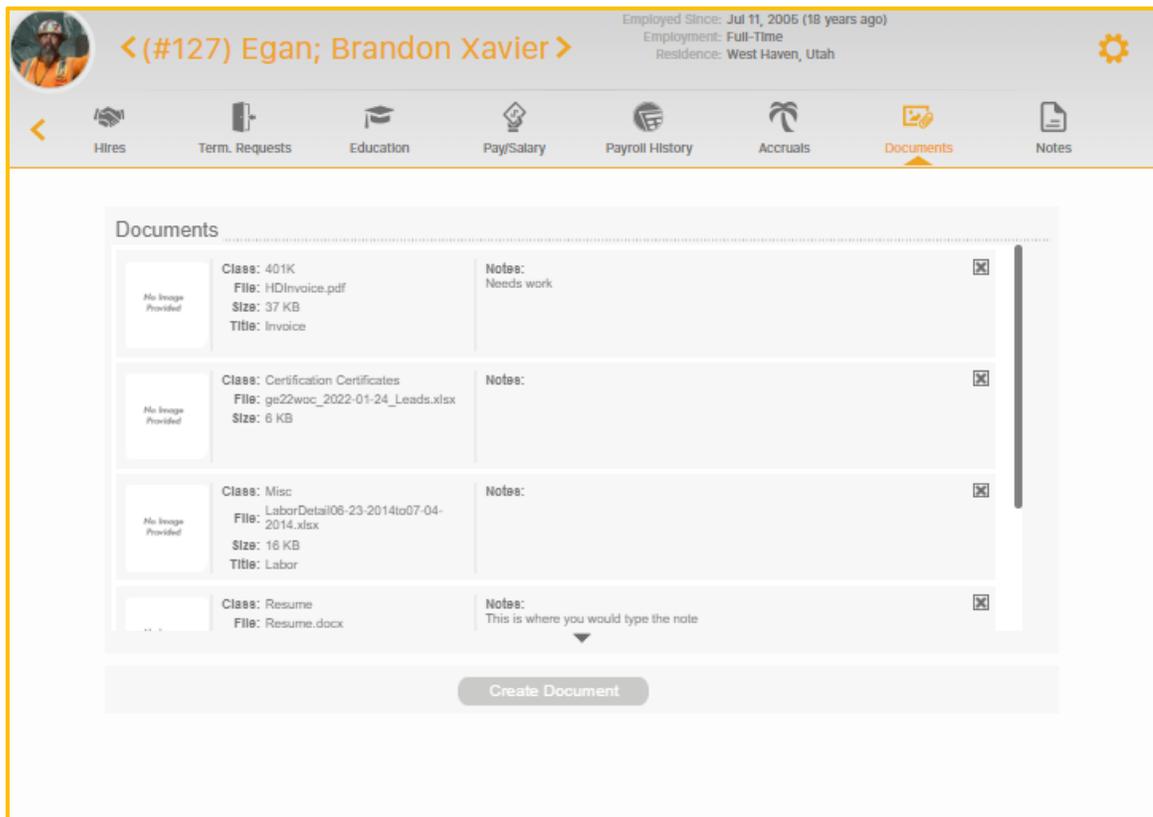
(#REG) Regular	
Total Accrued:	0.00
Total Spent:	0.00
Total Remaining:	0.00

- Accrued time can be searched upon using the search field and filtered by Active, Inactive or All Accruals.
- Total time accrued, total time spent and total time remaining display.
- The accrual totals on this page pull from the Employee Pay Tables set up within the accounting system.
- Accruals are only as accurate as the last posting date of payroll in the accounting system. Current time accrued or taken will not display until payroll has been exported to the accounting system.
- The Pay Stub accruals display YTD units for Time Posted to the employee. If employees have rollover time from the prior year, this may cause a differential in balances to display between the Pay Stub and HR numbers.

## Documents Tab

The Documents tab allows the logged in user to access documents assigned to their employee record. Both documents for the entire company and employees can be viewed from the employee's record. Documents are also stored, created, and managed in the Document Library. See [Document Library](#).

**Navigation: Navigate to HR>General>Employee Records>specific employee>Documents tab at the top of the Employee Record. Note:** The user may have to scroll to view some tabs.



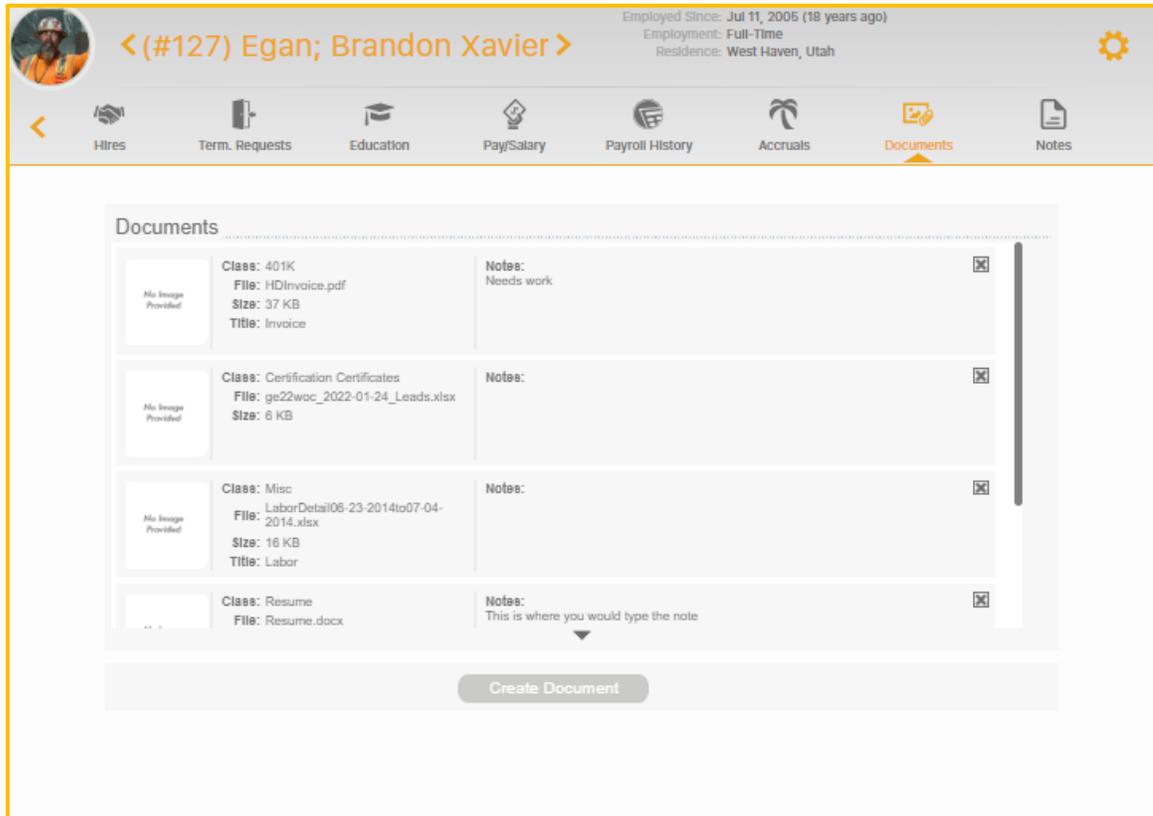
The screenshot displays the HR system interface for employee Egan, Brandon Xavier. The top navigation bar includes a back arrow, a search icon, and a settings gear. The employee's name and ID are shown as <(#127) Egan; Brandon Xavier>. To the right, it indicates the employee has been employed since July 11, 2006 (18 years ago), is full-time, and resides in West Haven, Utah. Below the navigation bar, there are icons for various HR functions: Hires, Term. Requests, Education, Pay/Salary, Payroll History, Accruals, Documents (highlighted), and Notes. The main content area is titled 'Documents' and contains a list of four documents. Each document entry includes a placeholder for an image, the class, file name, size, title, and a notes field with a delete icon. A 'Create Document' button is located at the bottom of the list.

Image	Class	File	Size	Title	Notes
No Image Provided	401K	HDInvoice.pdf	37 KB	Invoice	Needs work
No Image Provided	Certification Certificates	gs22woc_2022-01-24_Leads.xlsx	6 KB		
No Image Provided	Misc	LaborDetail06-23-2014to07-04-2014.xlsx	16 KB	Labor	
...	Resume	Resume.docx			This is where you would type the note

- Documents may be added, edited, or deleted.

## To Add a Document:

1. Navigate to HR>General>Employee Records>specific employee>Documents tab at the top of the Employee Record.

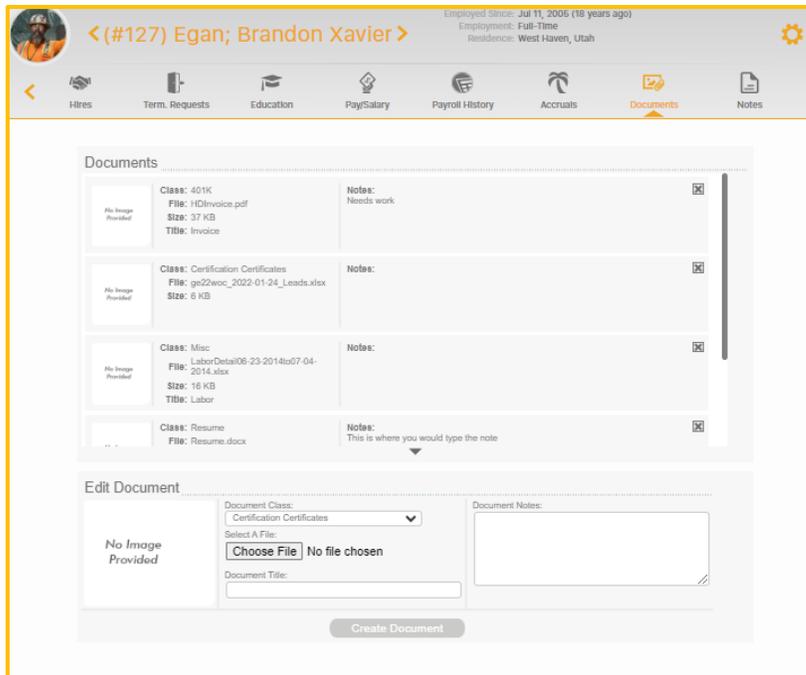


The screenshot displays the HR system interface for employee Brandon Xavier Egan. The top navigation bar includes a back arrow, a profile picture, the employee name <(#127) Egan; Brandon Xavier>, and a settings gear. Employee details shown are: Employed Since: Jul 11, 2005 (18 years ago), Employment: Full-Time, and Residence: West Haven, Utah. The main navigation menu contains icons for Hires, Term. Requests, Education, Pay/Salary, Payroll History, Accruals, Documents (highlighted), and Notes. The 'Documents' section lists four items:

Class	File	Size	Title	Note
401K	HDInvoice.pdf	37 KB	Invoice	Needs work
Certification Certificates	ge22woc_2022-01-24_Leads.xlsx	6 KB		
Misc	LaborDetail06-23-2014to07-04-2014.xlsx	16 KB	Labor	
Resume	Resume.docx			This is where you would type the note

At the bottom of the document list is a 'Create Document' button.

2. Select Create Document.



3. Select the Document Class.
4. Select the File from Choose File.
5. Create a Document Title and enter it in the Document Title field.
6. If utilized fill out the Custom Fields.
7. Enter any Document Notes.
8. Click Create Document once more.
9. The document will automatically display in the employee's Document tab.

**To Edit a Document:**

1. Navigate to HR>General>Employee Records>specific employee>Documents tab at the top of the Employee Record.
2. Click on Document.
3. Make any necessary changes.
4. Select Finished.

### To Delete a Document:

1. Navigate to HR>General>Employee Records>specific employee>Documents tab at the top of the Employee Record.
2. Select the X next to the document.

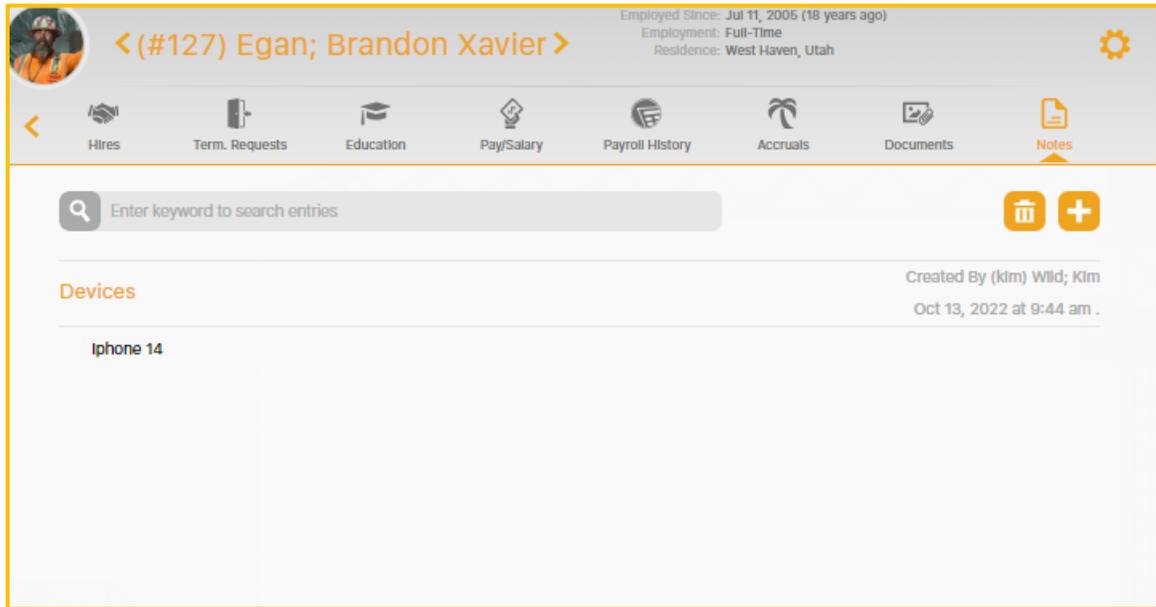


3. Select Yes. **Note:** Archive is equivalent to permanent deletion.

## Notes Tab

The Notes tab provides the user the ability to store notes about a particular employee. **Use Case:** A typical use case for this feature is to store information about devices or vehicles assigned to a particular employee.

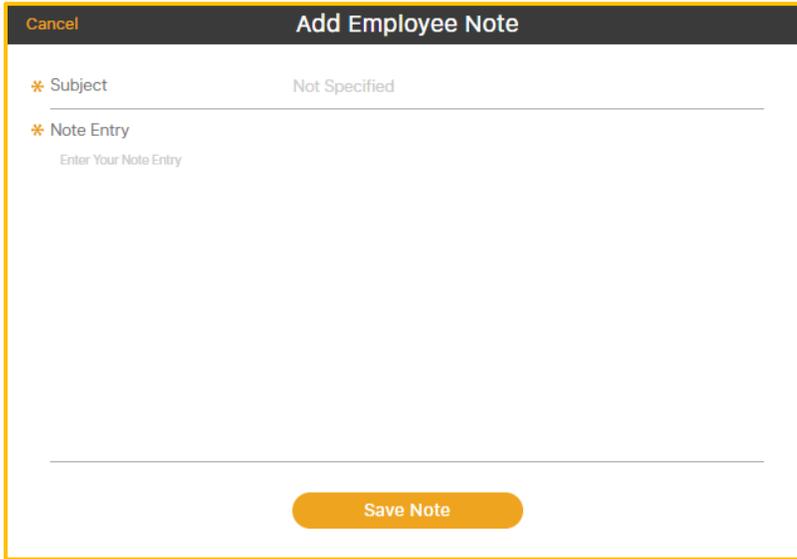
**Navigation:** Navigate to **HR>General>Employee Records>specific employee>Notes tab at the top of the Employee Record.** **Note:** The user may have to scroll to view some tabs.



- Notes may be viewed added or deleted.

### To Add a Note:

1. Navigate to HR>General>Employee Records>specific employee>Notes tab at the top of the Employee Record. **Note:** The user may have to scroll to view some tabs.
2. Select Add  icon.

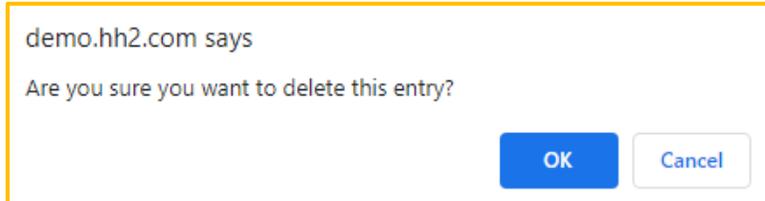


The screenshot shows a mobile application interface for adding an employee note. The form is titled "Add Employee Note" and has a "Cancel" button in the top left corner. The form contains two main sections: "Subject" with a placeholder text "Not Specified" and "Note Entry" with a placeholder text "Enter Your Note Entry". At the bottom of the form is a yellow "Save Note" button.

3. Enter a Subject.
4. Enter the Note.
5. Select Save Note.
6. The Note will appear on the employee's record.

### To Delete a Note:

1. Navigate to HR>General>Employee Records>specific employee>Notes tab at the top of the Employee Record.
2. Select the Delete  icon.
3. Delete icons will now display next to all Notes.
4. Select the Note(s) to delete.

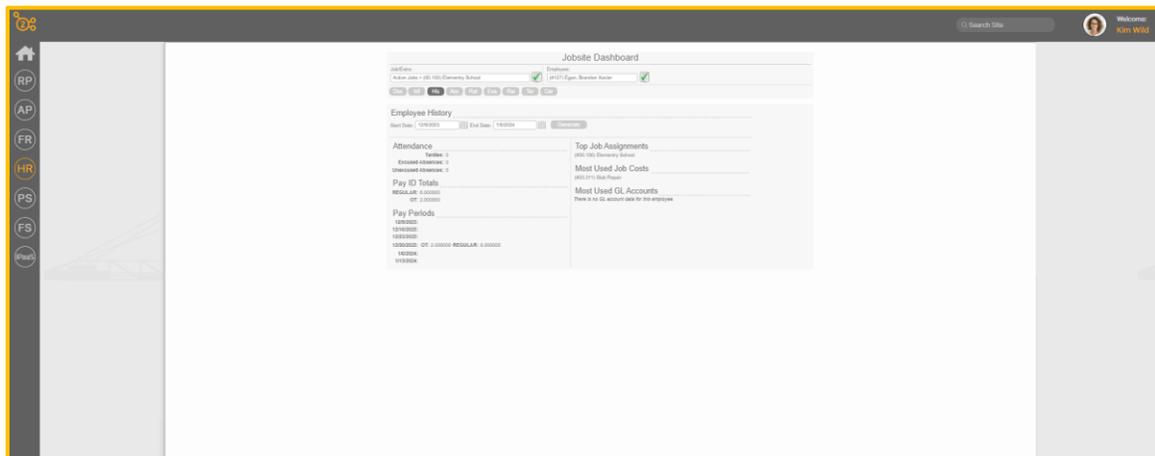


5. Select OK.
6. Select the Delete  icon to exit the delete mode.

## Job Site Dashboard

The Job Site Dashboard provides a user, such as a foreman with permissions, the ability to search by job and view and manage employee information by that job. **Note:** This does not include pay or salary information.

**Navigation: HR>General>Job Site Dashboard.**



Permissions must be granted first.

### To Grant Job Site Dashboard User Permission:

1. Navigation: Home Page>Setup>User Setup>select the specific user>Job Roles tab>HR-User.
2. Select the Magnifying  icon next to HR user.
3. Click the Add  icon next to any Jobs not currently assigned to the user that the Administrator intends to grant access.
4. When the user selects the X icon next to any assigned Jobs, it will unassign a user from accessing those job within HR.

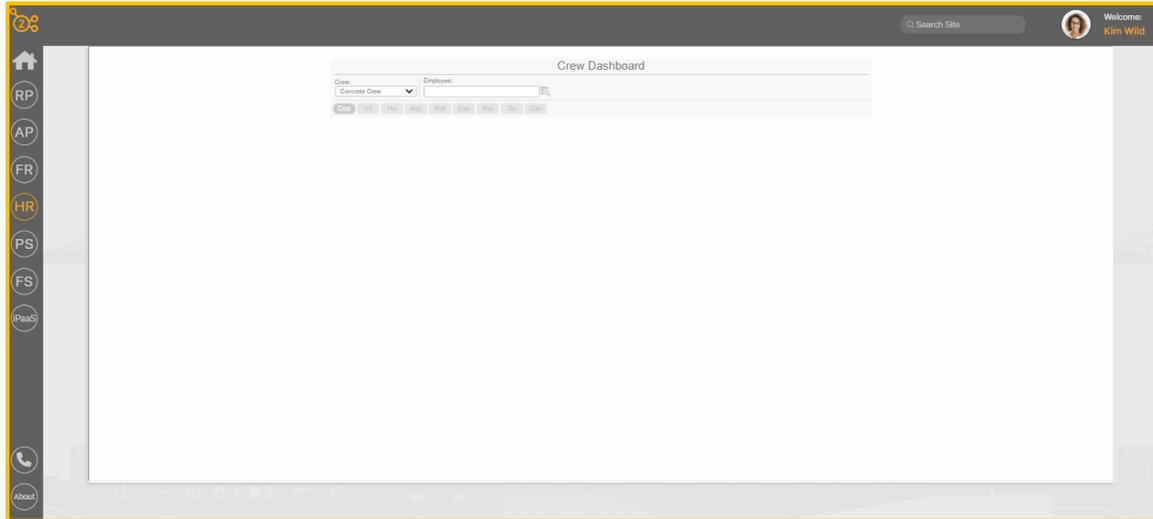
### To View and Manage Employee Data via the Job Site Dashboard:

1. Navigation: HR>General>Job Site Dashboard.
2. Search for the Job/Extra using the Magnifying  icon.
3. Search for the Employee using Magnifying  icon.
4. Select the following to view and manage corresponding employee data:
  - **Doc:** Is used to view employee, or global (company-wide) documents. Documents may also be edited by clicking on a specific document, editing the data, and selecting Finished.
  - **Inf:** Is used to view emergency contact information, hire dates, Payroll Group and Default Equipment information. The user may toggle between the Employee Info and Emergency Contacts tabs for corresponding information.
  - **His:** Is used to view history related to attendance, pay periods, assigned jobs, and most used cost codes and GL Accounts. To further filter data, select the dates and choose Generate to view filtered data.
  - **Acc:** Is used to view total time accrued, hours spent and hours remaining.
  - **Rat:** Is used to view employee ratings. Employees may also be rated by hovering the mouse and selecting a rating.
  - **Eva:** Is used to evaluate employee skills. Enter comments and hover the mouse over the skill to evaluate (rate) the employee's skills.
  - **Rai:** Is used to enter a raise request for an employee by entering the current pay rate proposed pay rate, any comments and then selecting Submit Request.
  - **Ter:** Is used to enter a termination request. Enter the Current Pay Rate, check, or leave unchecked the Would Rehire field and enter any comments. Then select Submit Request.
  - **Cer:** Is used to view all the employee's certifications.

## Crew Dashboard

Similar to the Job Site Dashboard, the Crew Dashboard displays employee information. However, instead of displaying information by Job, it is displayed by Crew. The same data displays as it does for the Job Site Dashboard.

**Navigation: HR>General>Crew Dashboard.**



Permissions must be granted first.

### To Grant Crew Dashboard User Permission:

1. Navigation: Home Page>Setup >User Setup> select the specific user>Site Roles tab.
2. Check the permission HR Crew Dashboard.
3. Next, navigate to HR>Configuration>Crews>select a crew > under the left column titled Web Service Users select the user needing access to the crew.
4. Click the single > icon.
5. Select Finished.

### To View Employee Data via the Crew Dashboard:

1. Navigation: HR>General>Crew Dashboard.
2. Search for the Crew using the Magnifying  icon.
3. Search for the Employee using Magnifying  icon.
4. Select the following to view and manage corresponding employee data:
  - **Doc:** Is used to view employee, or global (company-wide) documents. Documents may also be edited by clicking on a specific document, editing the data, and selecting Finished.
  - **Inf:** Is used to view emergency contact information, hire dates, Payroll Group and Default Equipment information. The user may toggle between the Employee Info and Emergency Contacts tabs for corresponding information.
  - **His:** Is used to view history related to attendance, pay periods, assigned jobs, and most used cost codes and GL Accounts. To further filter data, select the dates and choose Generate to view filtered data.
  - **Acc:** Is used to view total time accrued, hours spent and hours remaining.
  - **Rat:** Is used to view employee ratings. Employees may also be rated by hovering the mouse and selecting a rating.
  - **Eva:** Is used to evaluate employee skills. Enter comments and hover the mouse over the skill to evaluate (rate) the employee's skills.
  - **Rai:** Is used to enter a raise request for an employee by entering the current pay rate proposed pay rate, any comments and then selecting Submit Request.
  - **Ter:** Is used to enter a termination request. Enter the Current Pay Rate, check, or leave unchecked the Would Rehire field and enter any comments. Then select Submit Request.
  - **Cer:** Is used to view all the employee's certifications.

# My Records

The My Records feature allows the user to view their own records from the website. Much of the same information seen on Employee Records can be accessed from the My Records feature. However this information is specific to the user currently logged into the hh2 website. For instance, the HR Manager or Administrator could view their own records from this location, whereas records viewed from Employee Records are for all employees (including their own), and will include additional tabs. **Note:** The tabs that display will be based upon the tabs selected in HR>Settings>System Settings>My Records tab.

## Navigation: HR>General>My Records

Employee: May 01, 2000 (24 years ago)  
Employment: N/A  
Residence: Demoville, California

(#122) Wild; Kim

Info Change Request Benefits Pay Stubs Accruals W-2 / Tax Forms Documents

Employee Details

- Employee Photo
- Address
- Personal Info
- Sensitive Info
- Emergency Contacts

Code	122
Imported Name	Wild; Kim
First Name	Kim
Middle Name	Not Specified
Last Name	Wild
Hire Date	May 01, 2000
Rehire Date	Not Specified
Termination Date	Not Specified
Employment Type	Not Specified
Email	camrysam3@yahoo.com
Phone	444-444-4444
Cell	555-555-5555

Modified by Admin; hh2 (hh2\_admin) on Jan 30, 2014 8:27 am

## Information Tab

### Employee Details

**Navigation:** HR>General>My Records> Info tab at the top>Employee Details tab on the side.

When the Information  tab is selected at the top of the Employee Record (the logged in employee's record), the following tabs display along the left side of the page:

**Employee Details:** The employee's details are stored here. These details are populated from the accounting system. Details include the following items:

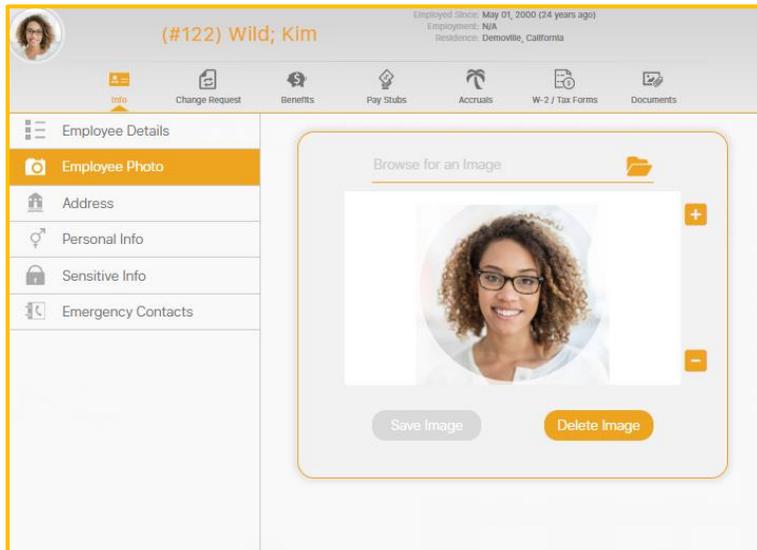
- Employee's Code
- Imported Name
- Name (first, middle, and last)
- Hire, Rehire and Termination Date (if updated in the accounting system, these dates will update in hh2)
- Employment Type (Not Specified, Contract, Full-Time, Part-Time, or a custom field used by the construction company)
- Active or Not
- Email, Phone and Cell Phone number

**Note:** Sage 300 CRE must be used to update information back to the accounting system.

## Employee Photo

Similar to the Employee Photo tab from HR>General>Employee Records, the Employee Photo tab from My Records (HR>General>My Records) allows the logged in user to upload their photo to the hh2 website.

**Navigation: HR>General>My Records> Employee Photo tab on the side.**



- A photo can be added, deleted, or zoomed in or out.

### To Add a Photo:

1. Browse for a photo using the Folder  icon.
2. Select the image and choose Open.
3. Select Save Image.
4. The image will now display on the employee's record.

### To Delete a Photo:

1. Select Delete Image.
2. The image immediately deletes.

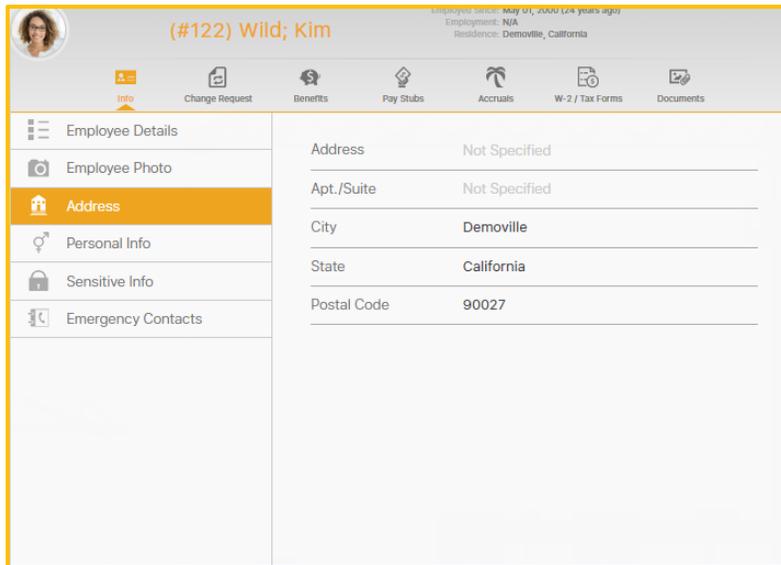
### To Zoom In or Out:

1. Use the  to display the photo larger.
2. Use the  to display the photo smaller.

## Address

The logged in user's address information is stored in the Address tab.

**Navigation: HR>General>Employee Records>My Records> Address tab on the side.**

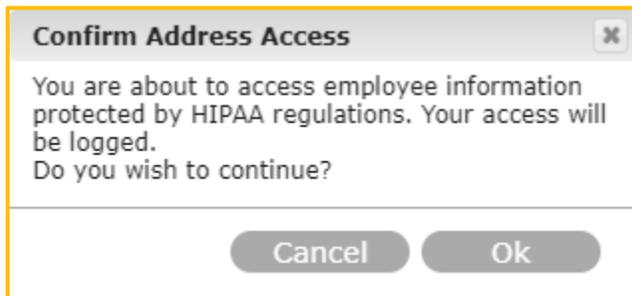


The screenshot shows the HR system interface for employee Kim Wild. The top navigation bar includes tabs for Info, Change Request, Benefits, Pay Stubs, Accruals, W-2 / Tax Forms, and Documents. The left sidebar has a menu with options: Employee Details, Employee Photo, Address (highlighted), Personal Info, Sensitive Info, and Emergency Contacts. The main content area displays the following address information:

Address	Not Specified
Apt./Suite	Not Specified
City	Demoville
State	California
Postal Code	90027

### To Access Employee Address Information:

1. Navigate to HR>General>My Records> Info tab at the top> Address tab on the side.



The screenshot shows a dialog box titled "Confirm Address Access" with a close button (X) in the top right corner. The text inside the dialog reads: "You are about to access employee information protected by HIPAA regulations. Your access will be logged. Do you wish to continue?" At the bottom of the dialog, there are two buttons: "Cancel" and "Ok".

2. When users access the Address tab, a warning message appears stating that the employee address information is protected, and user access will be logged.
3. Select Ok to continue, otherwise select Cancel.

## Personal Info

Gender, Ethnicity, Nation of Origin and Marital Status are stored in the Personal Information tab.

**Navigation: HR>General>My Records> Info tab at the top>Personal Info tab on the side.**

Field	Value
Gender	Female
Ethnicity	Other
Nation of Origin	United States
Marital Status	Married

**Note:** Employees may not change their own information, therefore the dropdown Picklists will not be available. The system is designed to have employees go through the Change Request process and receive administrative permission to have changes processed.

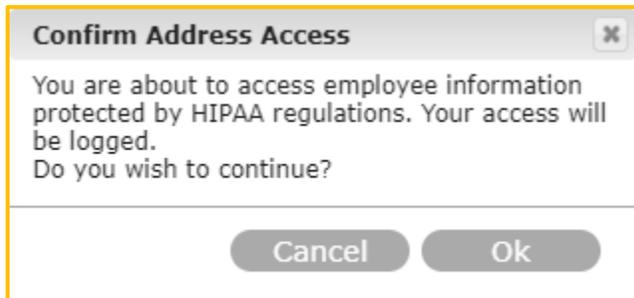
## Sensitive Information

Date of Birth and Social Security Number are stored in the Sensitive Information tab for the user currently logged into hh2.

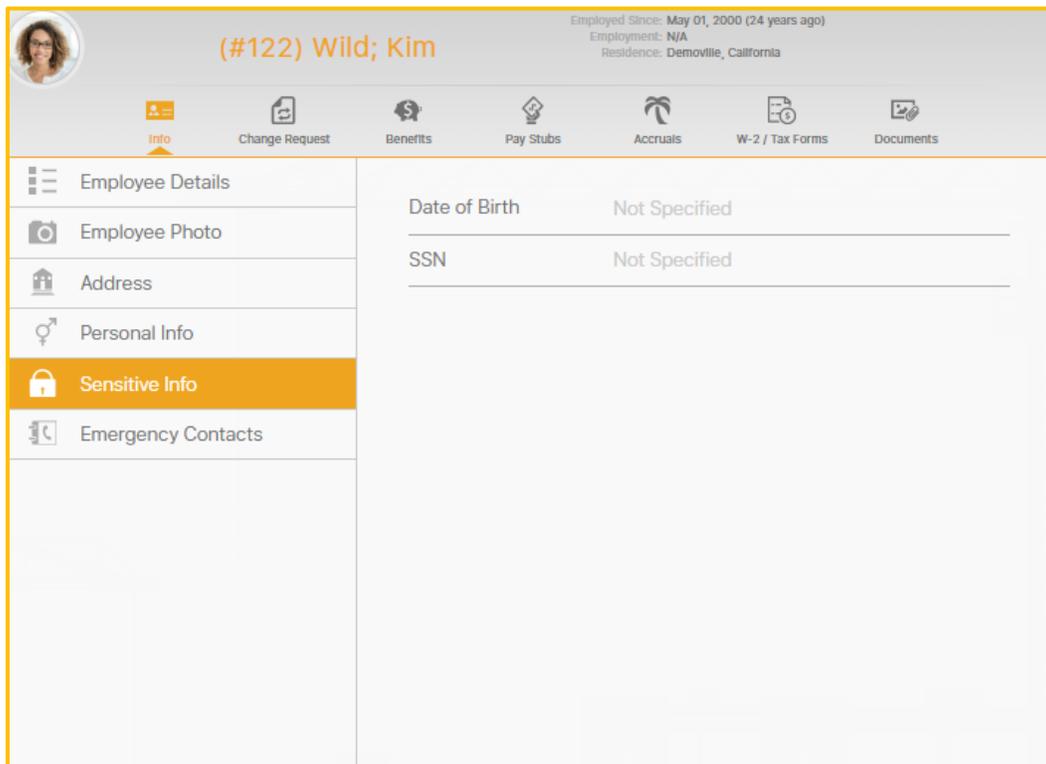
**Navigation: HR>General>My Records> Info tab at the top>Sensitive Information tab on the side.**

### To View Sensitive Information:

1. When users access the Sensitive Information tab, a warning message appears stating that the employee address information is protected, and user access will be logged.



2. Select Ok to continue, otherwise cancel.



## Emergency Contacts

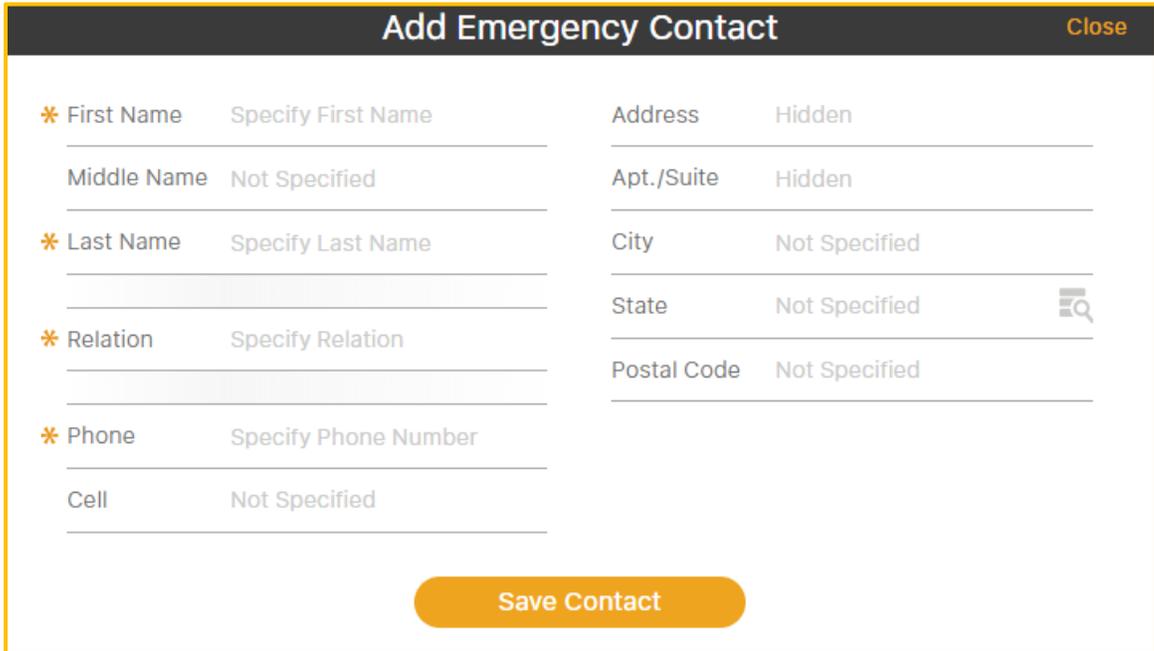
The logged in employee's emergency contacts are stored in the Emergency Contact tab and can be added, modified, or deleted. **Note:** This information does not synchronize back to the accounting system.

**Navigation:** HR>General>My Records>Info tab at the top>Emergency Contacts on the side.

The screenshot displays the HR system interface for employee Kim Wild. At the top, the employee's name and ID are shown as "(#122) Wild; Kim". To the right, employment details are listed: "Employed Since: May 01, 2000 (24 years ago)", "Employment: N/A", and "Residence: Demoville, California". A navigation bar below the header contains icons for Info, Change Request, Benefits, Pay Stubs, Accruals, W-2 / Tax Forms, and Documents. On the left side, a menu lists various sections: Employee Details, Employee Photo, Address, Personal Info, Sensitive Info, and Emergency Contacts (which is highlighted in orange). The main content area features a search bar with the placeholder text "Enter keyword to search" and a search icon. Below the search bar, a search result for "Wild; Jeff" is displayed, identifying him as the "Husband" with contact information: "Ph: (777) 477-7777" and "Cell: (555) 555-5555". A circular icon with the initials "JW" is also visible next to the name.

**To Add an Emergency Contact:**

1. Navigation: HR>General>My Records> Info tab at the top>Emergency Contact tab on the side.
2. Select the Add  icon.



Add Emergency Contact		Close	
* First Name	Specify First Name	Address	Hidden
Middle Name	Not Specified	Apt./Suite	Hidden
* Last Name	Specify Last Name	City	Not Specified
* Relation	Specify Relation	State	Not Specified
* Phone	Specify Phone Number	Postal Code	Not Specified
Cell	Not Specified		

Save Contact

3. Complete the emergency contact information on the Add Emergency Contact Page.
4. Select Save Contact.

### To Modify an Emergency Contact:

1. Navigation: HR>General>My Records> Info tab at the top>Emergency Contact tab on the side.
2. Select the Emergency Contact.

**Confirm Address Access** ✕

You are about to access employee information protected by HIPAA regulations. Your access will be logged.  
Do you wish to continue?

3. Select Ok.

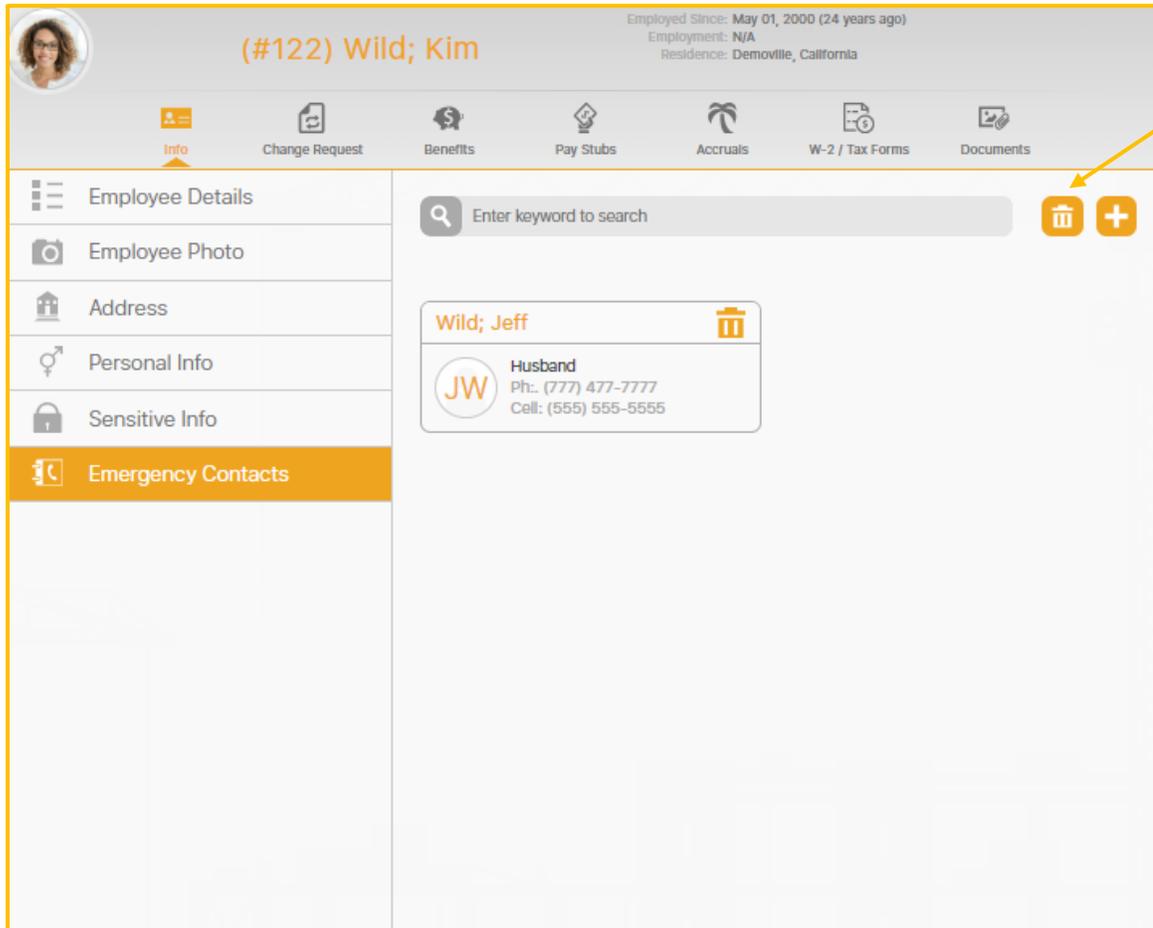
**Edit Emergency Contact** Close

* First Name	Jeff	Address	Hidden
Middle Name	Not Specified	Apt./Suite	Hidden
* Last Name	Wild	City	Demoville
* Relation	Husband	State	California 
* Phone	(777) 477-7777	Postal Code	90027
Cell	(555) 555-5555		

4. Make any modifications.
5. The Ajax check mark will indicate the change was accepted.
6. Select Close.

## To Delete an Emergency Contact:

1. Navigation: HR>General>My Records> Info tab at the top>Emergency Contact tab on the side.
2. Select the Delete  icon.



3. Delete icons will now display next to all Emergency Contacts.
4. Select the Delete  icon for each Emergency Contact to delete.
5. Select the Delete  icon to exit the delete mode.

## Change Requests Tab

The logged in user can submit their own change requests regarding name, date of birth, marital status, gender ethnicity, origin phone and address information from this tab.

**Navigation: HR>General>My Records>Change Request tab at the top.**

(#122) Wild; Kim		Employed Since: May 01, 2000 (24 years ago) Employment: N/A Residence: Demoville, California	
Info	Change Request	Benefits	
Pay Stubs	Accruals	W-2 / Tax Forms	
Documents			
* First Name	Kim	* Phone	444-444-4444
Middle Name	Not Specified	Cell	555-555-5555
* Last Name	Wild	Email	camrysam3@yahoo.com
* Date of Birth	Not Specified	Address	Not Specified
Marital Status	Married	Apt./Suite	Not Specified
Gender	Female	City	Demoville
Ethnicity	Other	State	California
Origin	United States	Zip	90027
<b>Submit Change Request</b>			

### To Submit a Change Request:

1. Navigate to HR>General>My Records>Change Request tab at the top.

**Confirm Address Access**

You are about to access employee information protected by HIPAA regulations. Your access will be logged.  
Do you wish to continue?

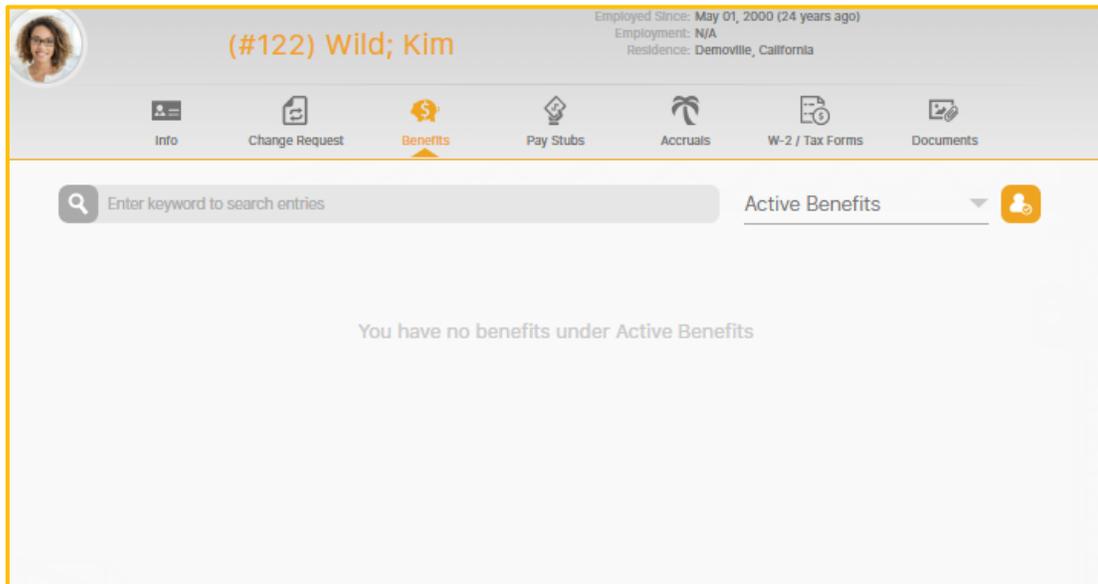
Cancel Ok

2. Select Ok.
3. Make any necessary changes.
4. Select Submit Change Request.
5. The change is automatically submitted. It will be either approved or rejected by the HR Administrator/Manager.

## Benefits Tab

The logged in user can view both their own benefits and benefits they are eligible to receive.

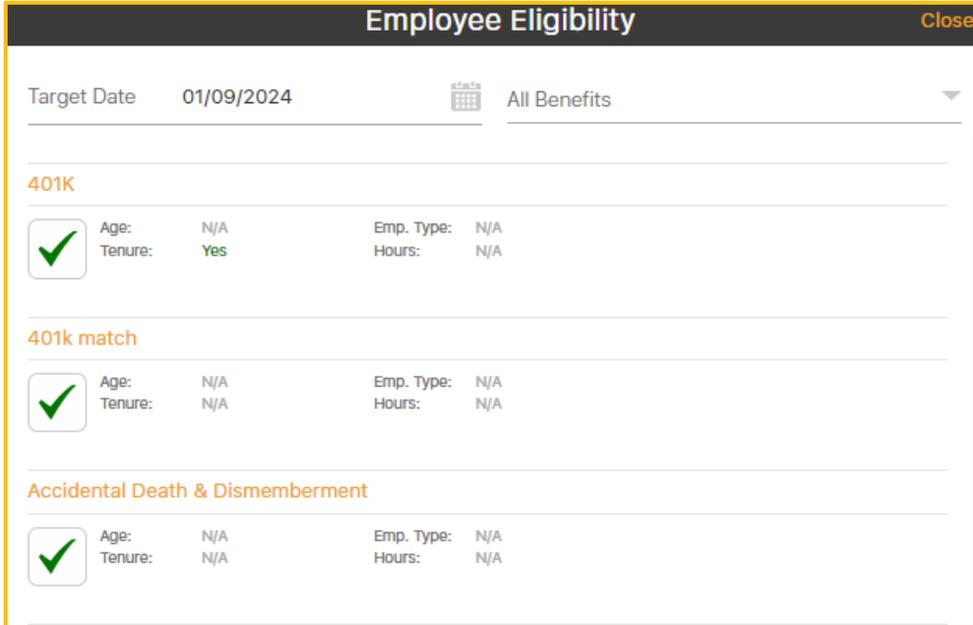
**Navigation: HR>General>My Records>Benefits tab at the top.**



- Benefits may be searched for using the Search field.
- Benefits may be filtered by Active Benefits, Conflicted Benefits, Inactive Benefits, or All Benefits.

### To View Benefits Eligible to Receive:

1. Navigate to HR>General>My Records>Benefits tab at the top.
2. Select the Eligible Benefits  icon.



The screenshot shows a window titled "Employee Eligibility" with a "Close" button in the top right corner. Below the title bar, there is a "Target Date" field set to "01/09/2024" and a "Picklist" dropdown menu currently set to "All Benefits". The main content area lists three benefit categories, each with a green checkmark in a box indicating eligibility:

- 401K**: Age: N/A, Tenure: Yes, Emp. Type: N/A, Hours: N/A
- 401k match**: Age: N/A, Tenure: N/A, Emp. Type: N/A, Hours: N/A
- Accidental Death & Dismemberment**: Age: N/A, Tenure: N/A, Emp. Type: N/A, Hours: N/A

3. Select a Target Date.
4. Select eligibility of benefits from the Picklist (All Benefits, Eligible Benefits, Projected Eligible Benefits, and Ineligible Benefits).
5. The benefits display according to the filters selected.
6. Green check marks indicate the employee is eligible for the benefit. Red Xs indicate they are not eligible for the benefit. When ineligible for benefits, a detailed view will display noting the reason for ineligibility. For instance, the employee does not meet age requirements.
7. Select Close.

## Pay Stubs Tab

The logged in user can view their own Pay Stubs (if the Pay Stub module is activated).

Navigation: HR>General>My Records>Pay Stubs tab at the top.

The screenshot shows the user interface for viewing pay stubs. At the top, there is a user profile for Kim Wild (#122) with employment details. Below this is a navigation bar with tabs for Info, Change Request, Benefits, Pay Stubs (highlighted), Accruals, W-2 / Tax Forms, and Documents. A date range selector is present, showing 'From Date' as 12-10-2023 and 'To Date' as 01-09-2024. A prominent orange button labeled 'Get Pay Stubs' is centered below the date range.

### To View Pay Stubs:

1. Navigate to HR>General>My Records>Pay Stubs tab at the top.
2. Select the From and To Dates using the calendar.
3. Select Get Pay Stubs.

The screenshot displays a detailed pay stub for hh2 Demo Company. It includes a table of earnings and deductions, a direct deposit notification, and a summary of year-to-date (YTD) pay units and taxes/deductions.

hh2 Demo Company										
940 North 1250 West, Centerville, UT, 84014										
HOURS		RATE		EARNINGS		OTHER PAY		PAY PERIOD		
REGULAR	OVERTIME			REGULAR	OVERTIME	BASIS	RATE	AMOUNT	DESCRIPTION	
						36.00	22.50	810.00	REGULAR	
									12/29/2023-1/5/2024	
									GROSS PAY	
									\$10.00	
FRINGES THIS PERIOD										
401K M	40.50								TOTAL FRINGES	
									40.50	
DEDUCTIONS THIS PERIOD										
DOCK	638.50	401K	40.50	HEALTH	50.00	FWR	40.50	MED	8.10	
SOC	12.15	UTSWE	20.25							TOTAL DEDUCTIONS
									171.50	
EMPLOYEE INFORMATION			YEAR - TO - DATE TOTALS				ACCRUALS			
(#122) Wild; Kim			GROSS	810.00	FICA	20.25	Regular HRL	-36.00	NET PAY	
			FWR	40.50	SMH	20.25			638.50	

hh2 Demo Company		DATE
940 North 1250 West Centerville, UT 84014 801-683-7890		1/5/2024
DEPOSITED FOR:		DESCRIPTION
Kim Wild Demoville, CA 90027		DDCK
		AMOUNT
		638.50
		NET PAY
		638.50
		TOTAL DEPOSIT
		638.50
		CHECK AMOUNT
		0.00

Direct Deposit Notification

2024 YTD Pay Units		2024 YTD Taxes/Deductions	
REGULAR HRLY	36.00 units	\$810.00	401K
VACATION TAKEN	0.00 units	\$0.00	FWR
HOLIDAY PAY	0.00 units	\$0.00	HEALTH
STANDARD	0.00 units	\$0.00	MED
			SOC
			UTSWE
			401K M
			\$40.50

## Accruals Tab

The logged in user can view their own accrued time, such as PTO, Sick and Vacation time.

**Navigation: HR>General>My Records>Accruals tab at the top.**

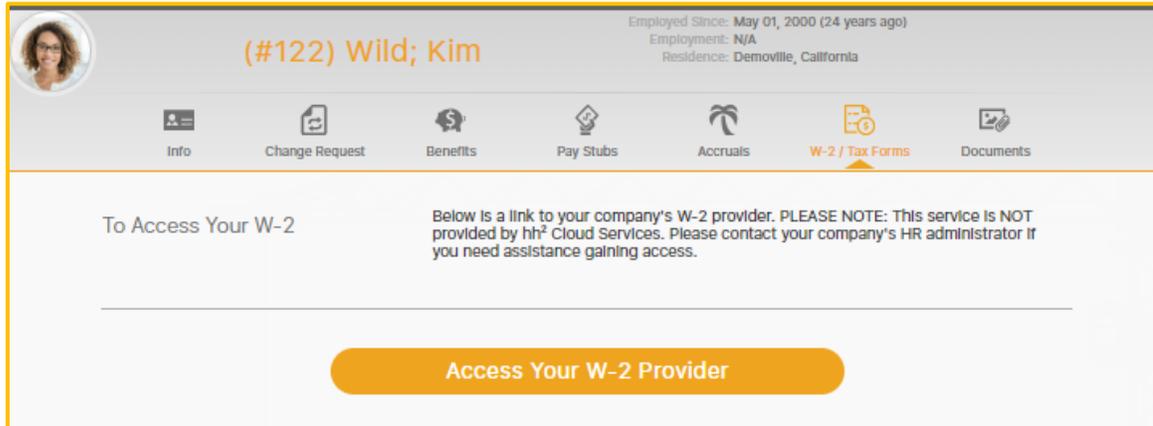
Category	Total Accrued	Total Spent	Total Remaining
(#SICK) Sick	40.00	10.00	30.00
(#VAC) Vacation	70.00	0.00	70.00

- Accruals may be searched for using the Search field.
- Accruals may be filtered by Active Accruals, Inactive Accruals, or All Accruals.
- Total Accrued, Total Spent and Total Remaining time displays.
- This is a view only page.

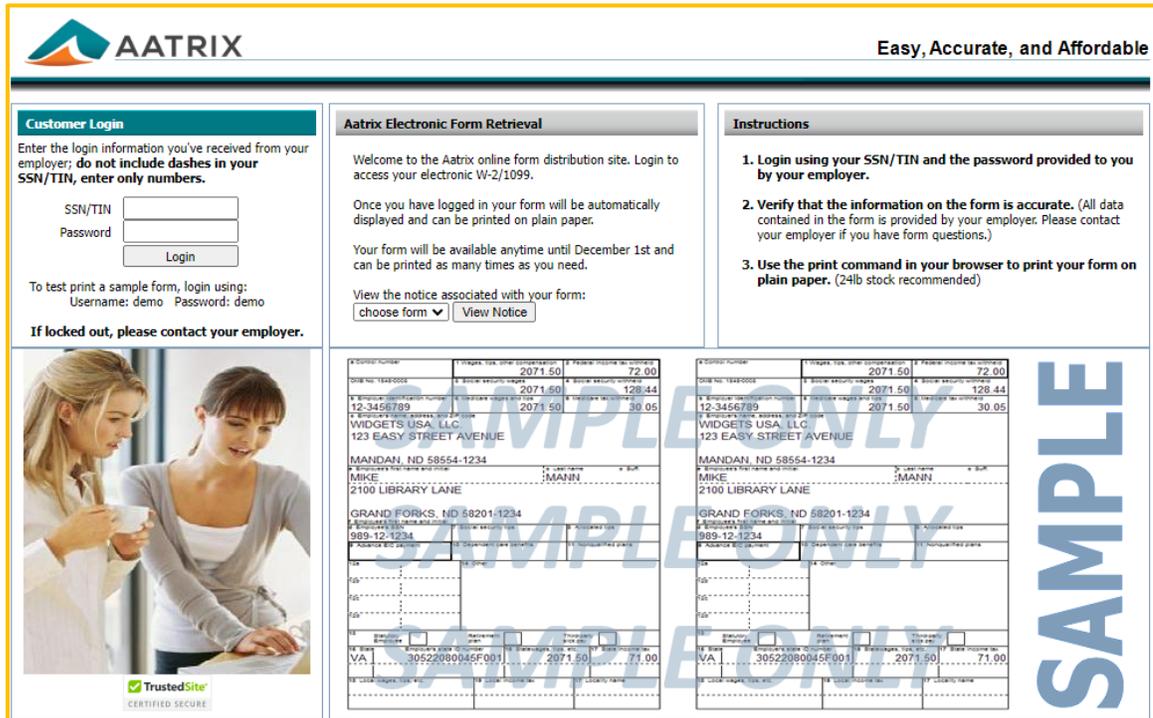
## W-2/Tax Forms Tab

The logged in user may utilize this tab to link to the 3<sup>rd</sup> party provider who provides W-2 and Tax related information. **Note:** This service is not provided by hh2.

**Navigation:** HR>General>My Records>W-2/Tax Forms tab at the top.



1. Select Access Your W-2 Provider. **Note:** This picture is a sample only and will vary by W-2 Provider.



2. Close the new tab to return to hh2 when complete.

## Documents Tab

The logged in user can view documents specific to self (Employee Documents) and those meant for company-wide consumption (Global Documents). Documents may be added or deleted.

**Navigation: HR>General>My Records>Documents tab at the top.**

The screenshot shows the user interface for the 'Documents' tab. At the top, the user's profile is displayed: a circular profile picture, the name '(#122) Wild; Kim', and employment details: 'Employed Since: May 01, 2000 (24 years ago)', 'Employment: N/A', and 'Residence: Demoville, California'. Below the profile is a navigation bar with icons for 'Info', 'Change Request', 'Benefits', 'Pay Stubs', 'Accruals', 'W-2 / Tax Forms', and 'Documents' (which is highlighted). The main content area is titled 'Global Documents' and 'Employee Documents'. A 'Document Class' dropdown menu is set to '401K'. Below this, there is a list of documents with columns for 'File', 'Size', 'Title', and 'Description'. Each document entry includes a 'No Image Provided' icon, a date added, and a user name. The documents listed are: 1) 'Invoice ldc prop test ocr.pdf' (54.505 KB, Title: test, Description: test), 2) 'HInvoice.pdf' (38.944 KB, Title: Invoice, Description: Needs work), 3) 'Volcano Construction Services Ltd. Quote.pdf' (555.959 KB, Title: Volcano, Description: McClone Construction), and 4) 'iPad Layout.pdf' (2.64 KB, Title: iPad Layout, Description: Test). At the bottom, there is an 'Add A Document' section with a 'File' field containing a 'Choose File' button and 'No file chosen' text, a 'Document Title' input field, and a 'Document Description' text area. A 'Create Attachment' button is located at the bottom right of this section.

- Global or Employee Documents may be searched for by Document Class.
- Global or Employee Documents may be viewed, added, edited, or deleted according to the Document Class's permissions set for employees. See [Document Class](#).

### To View Global Documents:

1. Navigate to HR>General>My Records>Documents tab.
2. Select the Global Documents tab.
3. Select a Document Class.
4. Documents will be displayed based on the filter.

### To Add a Global Document:

1. Navigate to HR>General>My Records>Documents tab.
2. Select the Global Documents tab.
3. Select Choose File.
4. Select the file.
5. Select Open.
6. Enter a Document Title.
7. Enter a Document Description.
8. Select Create Attachment.

### To Edit a Global Document:

1. Select the document with a click.
2. Make the necessary modifications in the Edit a Document section (if permitted).
3. Select Finished.

### To Delete a Global Document:

1. Navigate to HR>General>My Records>Documents tab.
2. Select the Global Documents tab.
3. Select the **X** next to the Document to Delete.



4. Select Yes.
5. The document will no longer be displayed.

**To View Employee Specific Documents:**

1. Navigate to HR>General>My Records>Documents tab.
2. Select the Employee Documents tab.
3. Select a Document Class.
4. Documents will be displayed based on the filter.

**To Add an Employee Specific Document:**

1. Navigate to HR>General>My Records>Documents tab.
2. Select the Employee Documents tab.
3. Select Choose File.
4. Select the file.
5. Select Open.
6. Enter a Document Title.
7. Enter a Document Description.
8. Select Create Attachment.

**To Edit an Employee Specific Document:**

1. Select the document with a click.
2. Make the necessary modifications in the Edit a Document section (if permitted).
3. Select Finished.

### To Delete an Employee Specific Document:

1. Navigate to HR>General>My Records>Documents tab.
2. Select the Employee Documents tab.
3. Select the **X** next to the Document to Delete.

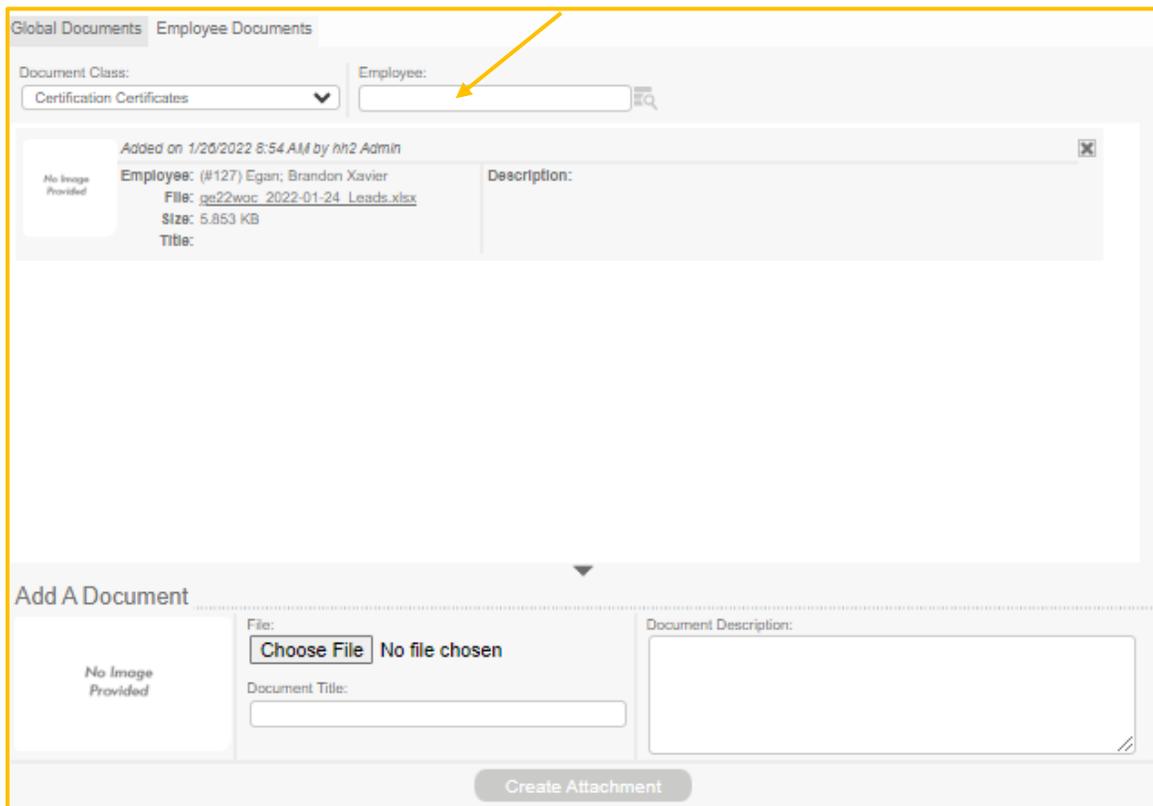


4. Select Yes.
5. The document will no longer be displayed.

## Document Library

The Document Library provides access to both company-wide (Global) documents and documents specific to each employee. The functionality is the same as the Documents tab in My Records, with one exception. The exception is that instead of accessing documents meant for the logged in user, the Documents Library allows the user, with permissions, to access documents meant for any specific employee. This difference is indicated by the Employee Search field.

**Navigation: HR>General>Document Library.**



The screenshot displays the Document Library interface. At the top, there are two tabs: "Global Documents" and "Employee Documents". Below the tabs, there are two search filters: "Document Class:" with a dropdown menu set to "Certification Certificates", and "Employee:" with a text input field and a search icon. A yellow arrow points to the "Employee:" input field. Below the search filters, there is a document entry card. The card includes a "No Image Provided" placeholder, a date and time stamp "Added on 1/26/2022 8:54 AM by hh2 Admin", the employee name "Employee: (#127) Egan; Brandon Xavier", a file name "File: qe22woc\_2022-01-24\_Leads.xlsx", a file size "Size: 5.853 KB", and a "Description:" field. At the bottom of the interface, there is an "Add A Document" section with a "File:" field containing a "Choose File" button and "No file chosen" text, a "Document Title:" input field, and a "Document Description:" text area. A "Create Attachment" button is located at the bottom center.

- Global Documents may be searched for by Document Class.
- Employee Documents may be searched for by Document Class and Employee.
- Global or Employee Documents may be viewed, added, edited, or deleted.

**To Find Global Documents:**

1. Navigate to HR>General>Document Library.
2. Select the Global Documents tab.
3. Select a Document Class.
4. Documents will be displayed based on the filter.

**To Add a Global Document:**

1. Navigate to HR>General>Document Library.
2. Select the Global Documents tab.
3. Select Choose File in the Add A Document section.
4. Select the file.
5. Select Open.
6. Enter a Document Title.
7. Enter a Document Description.
8. Select Create Attachment.

**To Edit a Global Document:**

1. Navigate to HR>General>Document Library.
2. Select the document with a click.
3. Make the necessary modifications in the Edit A Document section (if permitted).
4. Select Finished.

### To Delete a Global Document:

1. Navigate to HR>General>Document Library.
2. Select the Global Documents tab.
3. Select the **X** next to the Document to Delete.



4. Select Yes.
5. The document will no longer be displayed.

### **To Find Documents Specific to an Employee:**

1. Navigate to HR>General>Document Library.
2. Select the Employee Documents tab.
3. Select a Document Class.
4. Select an Employee using the Magnifying  icon.
5. Documents will be displayed based on the filter.

### **To Add an Employee Specific Document:**

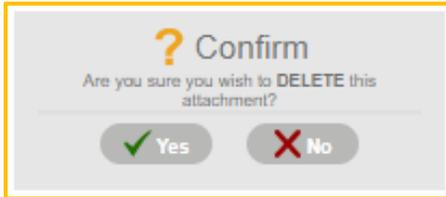
1. Navigate to HR>General>Document Library.
2. Select the Employee Documents tab.
3. Select a Document Class.
4. Select an Employee using the Magnifying  icon.
5. Select Choose File in the Add A Document section.
6. Select the file.
7. Select Open.
8. Enter a Document Title.
9. Enter a Document Description.
10. Select Create Attachment.

### **To Edit an Employee Specific Document:**

1. Navigate to HR>General>Document Library.
2. Select the Employee Documents tab.
3. Select a Document Class.
4. Select an Employee using the Magnifying  icon.
5. Select the document with a click.
6. Make the necessary modifications in the Edit a Document section (if permitted).
7. Select Finished.

### To Delete an Employee Specific Document:

1. Navigate to HR>General>Document Library.
2. Select the Employee Documents tab.
3. Select the Document Class.
4. Select an Employee using the Magnifying  icon.
5. Select the **X** next to the Document to Delete.



6. Select Yes.
7. The document will no longer be displayed.

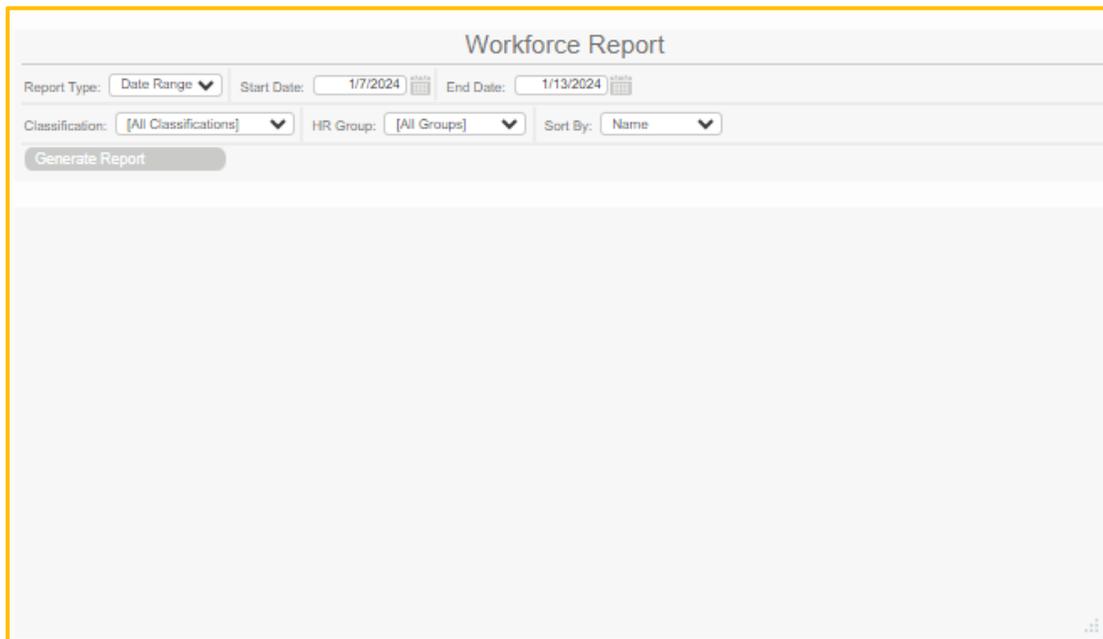
## Reporting

Workforce and EEO-1 Reporting options are available to the HR Manager/Administrator.

### Workforce

The Workforce report provides a high-level overview of the construction company's current workforce.

**Navigation: HR>Reporting>Workforce.**



The screenshot displays the 'Workforce Report' interface. At the top, the title 'Workforce Report' is centered. Below the title, there are several filter fields: 'Report Type' with a dropdown menu set to 'Date Range', 'Start Date' with a calendar icon and the value '1/7/2024', and 'End Date' with a calendar icon and the value '1/13/2024'. Below these, there are 'Classification' and 'HR Group' dropdown menus, both set to '[All Classifications]' and '[All Groups]' respectively, and a 'Sort By' dropdown menu set to 'Name'. A 'Generate Report' button is located below the filters. The main content area below the filters is currently empty.

Data may be filtered by:

- Report Type
- Date Range
- Classification
- HR Group

Data may be sorted by:

- Name
- Classification
- Hire Date

### To Generate a Workforce Report:

1. Navigate to HR>Reporting>Workforce.
2. Select the appropriate filters and sorting.
3. Select Generate Report.

#### Workforce Report

Report Type: Date Range Start Date: 1/7/2024 End Date: 1/13/2024

Classification: [All Classifications] HR Group: [All Groups] Sort By: Name

Generate Report

**Total Employees: 64**

Employee	Classification	Hire Date	Duration	T.	E.	U.
Ambrose; Curtly (#Curtly)		2/26/2016	7 yrs., 10 mos., 12 days	0	0	0
Banks; Amanda S (#133)		11/26/2009	14 yrs., 1 mos., 13 days	0	0	0
Bass; Jake (#161)		3/23/2022	1 yrs., 9 mos., 17 days	0	0	0
Beaman; Blake (#160)	General Laborer	4/3/2007	16 yrs., 9 mos., 6 days	0	0	0
Case; Backhoe (#201)		2/7/2017	6 yrs., 11 mos., 2 days	0	0	0
Damon; Brent (#125)	Superintendent	1/20/1990	33 yrs., 11 mos., 20 days	0	0	0
Dean; Jim (#162)	General Laborer	3/19/2005	18 yrs., 9 mos., 21 days	0	0	0
Dirk; Joe (#164)	Rough Carpenter	5/27/2006	17 yrs., 7 mos., 13 days	0	0	0
Do; John (#J001)		1/1/2018	6 yrs., 8 days	0	0	0
Dobson; Nick M (#139)	Company Officer	7/4/2006	17 yrs., 6 mos., 5 days	0	0	0
Doe; John (#140)	Company Officer	10/1/2003	20 yrs., 3 mos., 8 days	0	0	0
Doe; John (#TMP - 00002)		6/17/2019	4 yrs., 6 mos., 22 days	0	0	0

4. The report generates.

- T indicates the number of Tardies for an employee.
- E indicates the number of Excused Absences for an employee.
- U indicates the number of Unexcused Absences for an employee.

## EEO-1

This reporting feature generates data for EEO-1 (Equal Employment Opportunity-1) Reporting. The EEO-1 report is a mandatory survey for U.S. employers with 100 or more employees, collecting data on workforce composition by race, ethnicity, gender, and job category. It helps identify and address workplace discrimination and promotes diversity and inclusion.

**Navigation: HR>Reporting>EEO-1.**

EEO Report								
<b>Executive/Senior Level Officials and Managers</b>								
	Caucasion:	Black:	Hawaiian/Pacific Islander:	Hispanic:	Asian:	Native American/Alaska Native:	Two-Races:	Total:
Male:	1	0	0	0	1	0	0	2
Female:	0	0	0	0	0	0	0	0
<b>Technician</b>								
	Caucasion:	Black:	Hawaiian/Pacific Islander:	Hispanic:	Asian:	Native American/Alaska Native:	Two-Races:	Total:
Male:	1	0	0	0	0	0	0	1
Female:	0	0	0	0	0	0	0	0
<b>Administrative Support Worker</b>								
	Caucasion:	Black:	Hawaiian/Pacific Islander:	Hispanic:	Asian:	Native American/Alaska Native:	Two-Races:	Total:
Male:	0	0	0	0	0	0	0	0
Female:	1	0	0	0	0	0	0	1
<b>Craft Worker</b>								
	Caucasion:	Black:	Hawaiian/Pacific Islander:	Hispanic:	Asian:	Native American/Alaska Native:	Two-Races:	Total:
Male:	7	2	0	0	1	0	1	11
Female:	0	0	0	0	0	0	0	0
<b>Laborers and Helper</b>								
	Caucasion:	Black:	Hawaiian/Pacific Islander:	Hispanic:	Asian:	Native American/Alaska Native:	Two-Races:	Total:
Male:	7	1	0	0	2	0	1	11
Female:	0	0	0	0	0	0	0	0

- No action is needed. The report is automatically generated.
- The pull down carrot allows the user to adjust the size.

## Enterprise Reporting

The hh2 system offers a variety of ways to report data. Depending on the type of reporting, data may be viewed, exported to Excel and/or PDFs, charted or downloaded. Data for one employee, select employees or all employees may be managed.

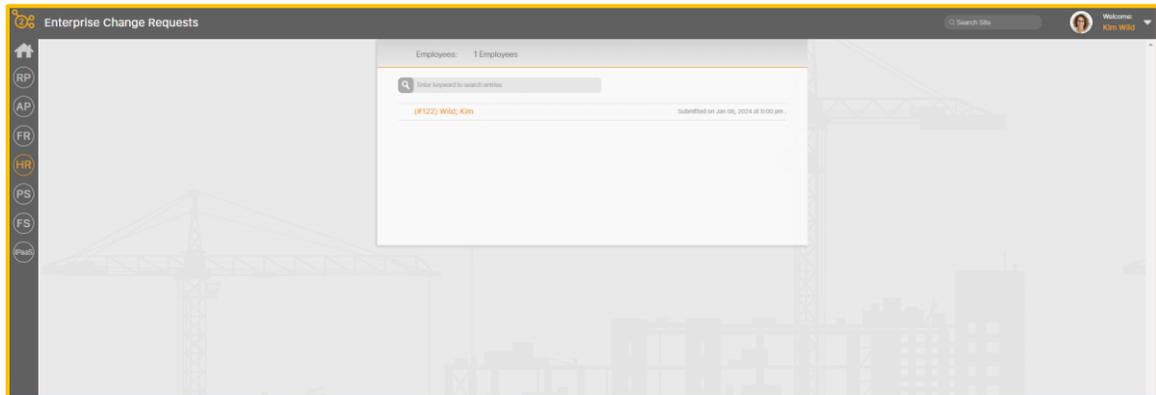
Available reporting includes:

- Enterprise Change Requests
- Enterprise Classifications
- Enterprise Locations
- Enterprise Certifications
- Raise Request Reporting
- Termination Request Reporting
- Enterprise Employee Pay
- Enterprise Benefit Enrollment
- Enterprise Benefit Eligibility

## Enterprise Change Requests

This feature allows all pending Change Requests to be viewed. This functionality provides a convenient overview of all pending Change Requests, allowing the HR Manager/Administrator to swiftly access and review the generated change request data.

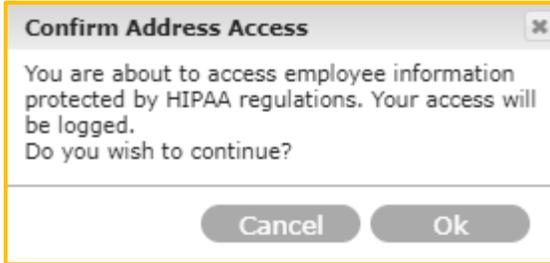
**Navigation: HR>Enterprise>Change Requests.**



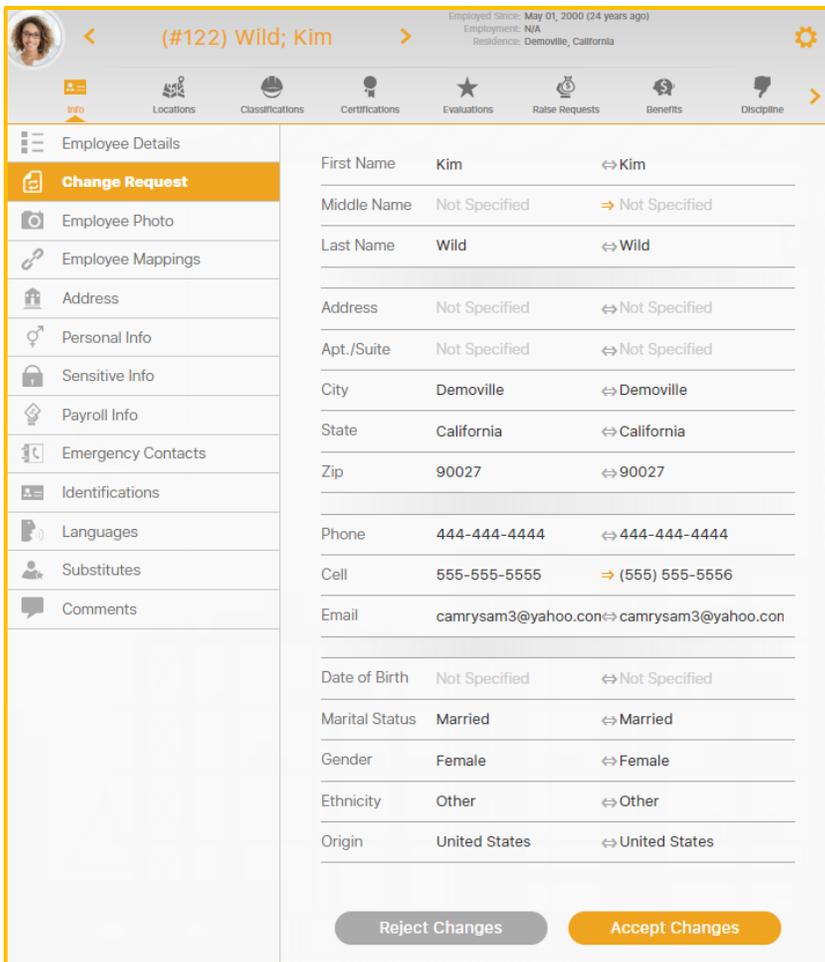
- All Change Requests display.
- Change Requests may be viewed, accepted, or rejected.

### To View and Either Accept or Reject the Change Request:

1. Navigate to HR>Enterprise>Change Requests.
2. Select the employee's name.

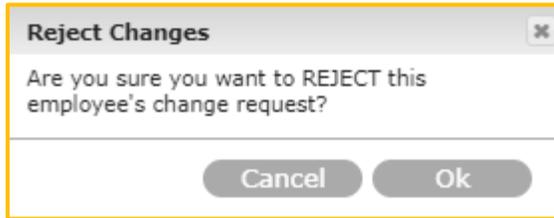


3. Select Ok.



4. Review the new data in the right column.
5. To accept changes, select Accept Changes. Upon acceptance, changes will reflect in the employee's record.

6. To reject changes, select Reject Changes.



7. Select Ok.

**Note:** The employee is not notified of either acceptance or rejection. The data is simply changed in the employee's record, or it is not.

## Enterprise Classification Report

This reporting feature allows the user to view and manage Classifications data. In addition, employees may be rated from this page. This feature functions just like the Classifications tab from the employee record (HR>General>Employee Records). However, from Enterprise Reporting, Classification data for all employees may be accessed, not just data for a specific employee.

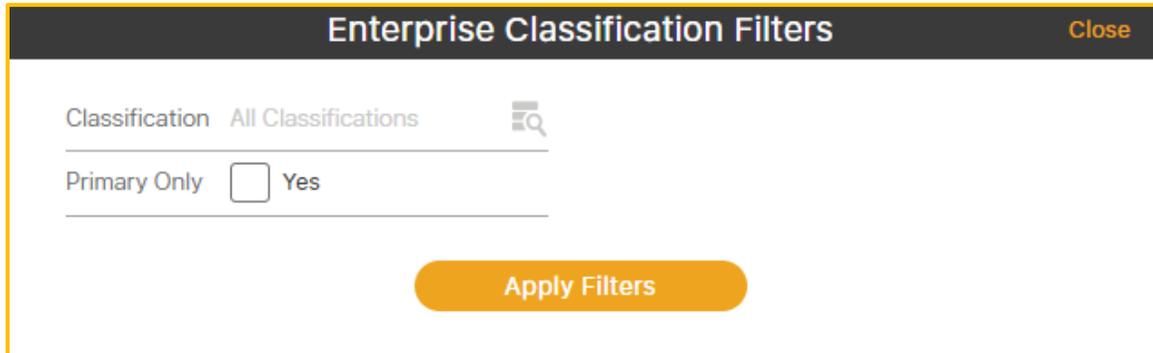
**Navigation: HR>Enterprise>Classifications.**

Employee	Classification	Rating	Submitted Ratings	Comments
(F133) Banks, Amanda S	HR Admin	2.75	None	This is a test quick rating.
(F133) Banks, Amanda S	Office Secretary	3.50	None	None
(F133) Banks, Amanda S	Company Officer	3.00	None	None
(F133) Banks, Amanda S	test123456	5.00	None	None
(F160) Damore, Blake	General Laborer	4.00	6 submitted (Avg. 23.75)	Blake is a good hard worker and has worked construction over 10 years.
(F160) Damore, Blake	Finish Carpenter	2.00	1 submitted (Avg. 4.00)	None
(F125) Damore, Brent	Concrete Form Setter	4.25	39 submitted (Avg. 141.25)	None

- Classification data may be searched by Employee or Classification using the Search field.
- Data may be sorted by Employee, Classification and Rating (Low to High and High to Low).
- Data may also be filtered by Classification and by Primary Classification, using the Filter  icon.
- Employees may be rated.
- Classification data may be added or deleted.
- Classifications may be assigned as Primary.
- Classification data may be exported to an Excel spreadsheet.

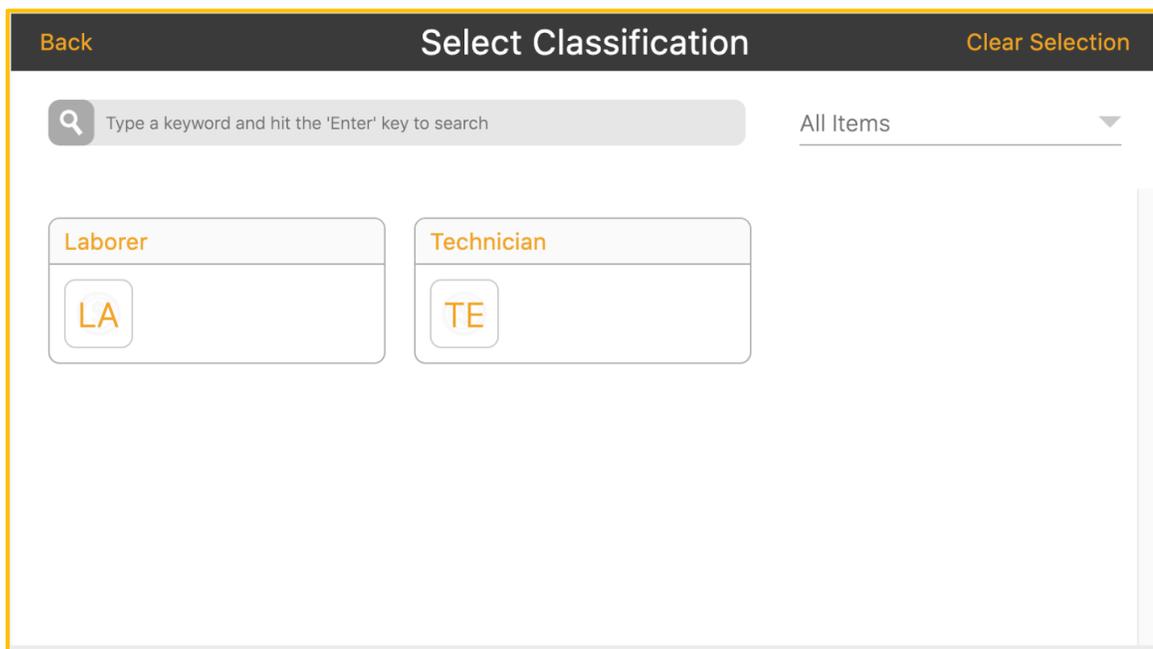
### To Filter Classification Data:

1. Navigate to HR>Enterprise>Classifications.
2. Select the Filter  icon.



The screenshot shows a dialog box titled "Enterprise Classification Filters" with a "Close" button in the top right corner. Below the title bar, there is a search field labeled "Classification" with the text "All Classifications" and a magnifying glass icon. Below the search field, there is a checkbox labeled "Primary Only" followed by the text "Yes". At the bottom of the dialog box, there is a large orange button labeled "Apply Filters".

3. Select the Classification using the Magnifying  icon.



The screenshot shows a dialog box titled "Select Classification" with "Back" and "Clear Selection" buttons in the top left and top right corners, respectively. Below the title bar, there is a search field with a magnifying glass icon and the text "Type a keyword and hit the 'Enter' key to search". To the right of the search field, there is a dropdown menu labeled "All Items" with a downward arrow. Below the search field, there are two classification cards: "Laborer" with a "LA" icon and "Technician" with a "TE" icon.

4. Search for the Classification using the Search field or select one that displays.
5. Check Primary Only Yes, to have only Primary Classifications display. Once filters are applied, only the Primary Classifications will be listed in the displayed classification list.
6. Select Apply Filters.

Classification: **Laborer**  
 Employees: 3 Employees

Filters Export

Enter keyword to search entries Sort By Employee

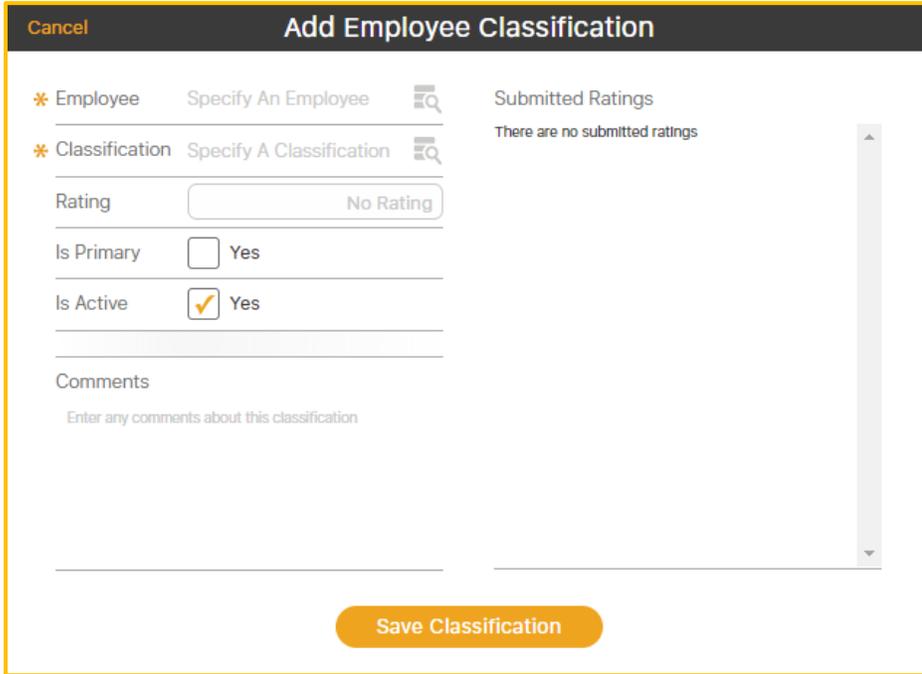
<b>N</b> (#323) 2; Number	Modified By (claytonadmin) Admin; Clayton on Mar 10, 2023 at 8:44 am .
<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; background: linear-gradient(to right, orange 37.5%, white 37.5%);"></div> <div style="margin-left: 10px;">3.75</div> </div>	Submitted Ratings: None Is Primary: Yes Comments: None
<b>12</b> (#134) Becker; Laurie B	Modified By (claytonadmin) Admin; Clayton on Mar 10, 2023 at 8:52 am .
<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; background: linear-gradient(to right, orange 35%, white 35%);"></div> <div style="margin-left: 10px;">3.50</div> </div>	Submitted Ratings: None Is Primary: Yes Comments: None
<b>SE</b> (#93854671) Emp. Android; Sam	Modified By (samAdmin) Admin; Sam on Sep 08, 2023 at 1:29 pm .
<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; background: linear-gradient(to right, orange 50%, white 50%);"></div> <div style="margin-left: 10px;">5.00</div> </div>	Submitted Ratings: None Is Primary: Yes Comments: test

### To Rate Employees from the Enterprise Classification Report Page:

1. Navigate to HR>Enterprise>Classifications.
2. Search and select a Classification using either the Search field or the Filter  icon.
3. Hover the mouse over the scale and move the rating to rate (from 0-5) for the associated Classification (by employee).
4. The Submitted Rating is displayed. It will be indicated whether the Classification is the employee's Primary Classification or not, and any comments will be shown. The person making the modification, along with a date and time stamp will be displayed.

## To Add Classifications:

1. Navigate to HR>Enterprise>Classifications.
2. Select the Add  icon.

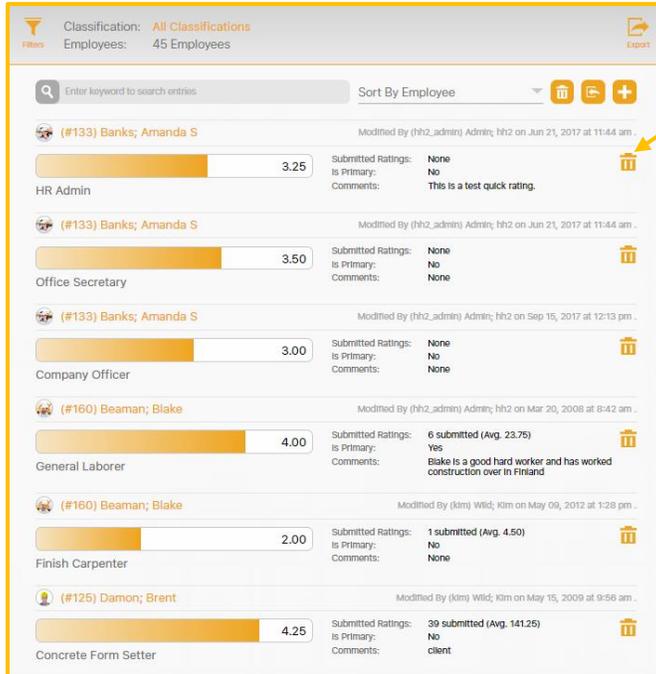


The screenshot shows a web form titled "Add Employee Classification". At the top left is a "Cancel" link. The form has two main sections for selection: "Employee" and "Classification", each with a search icon. Below these are fields for "Rating" (with a "No Rating" button), "Is Primary" (checkbox), and "Is Active" (checkbox, checked). There is a "Comments" section with a text area and a "Save Classification" button at the bottom.

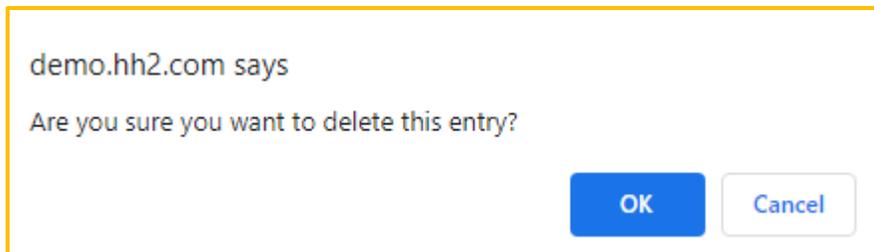
3. Search for the Employee using the Magnifying  icon.
4. Enter the Classification using the Magnifying  icon.
5. Select the Classification.
6. Select a Rating, if applicable, using the mouse to drag to the appropriate rating.
7. Check if this is the employee's Primary Classification or leave unchecked if not.
8. Check if the Classification is Active.
9. Make necessary comments, if applicable.
10. Select Save Classification.
11. The Classification will display on the employee's record.

## To Delete Classifications:

1. Navigate to HR>Enterprise>Classifications.
2. Select the Delete  icon.



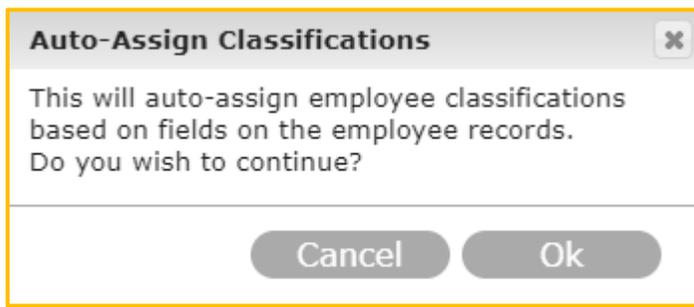
3. Delete icons will now display next to all Classifications.
4. Select the Delete  icon next to the Classification to delete.



5. Confirm the deletion by selecting Ok.
6. Select the Delete  icon to exit the delete mode.
7. The Classification will be removed from the selected employees' records.

### To Assign a Classification as Primary:

1. Navigate to HR>Enterprise>Classifications.
2. Search or sort by employees using the Search field or the Sort Picklist. This action will apply to all employees listed.
3. Select the Primary Assignment  icon.



4. Select Ok.
5. This assigns employee classifications based on fields in the employee record. This is based on the HR>Settings>System Setting>Sync Automation tab> Classification configuration. The field selected from the Picklist dropdown within this System Setting will determine from which field (Disabled, Default Certification Class, Occupation or Title) on the employee record is used to auto assign the primary classification.

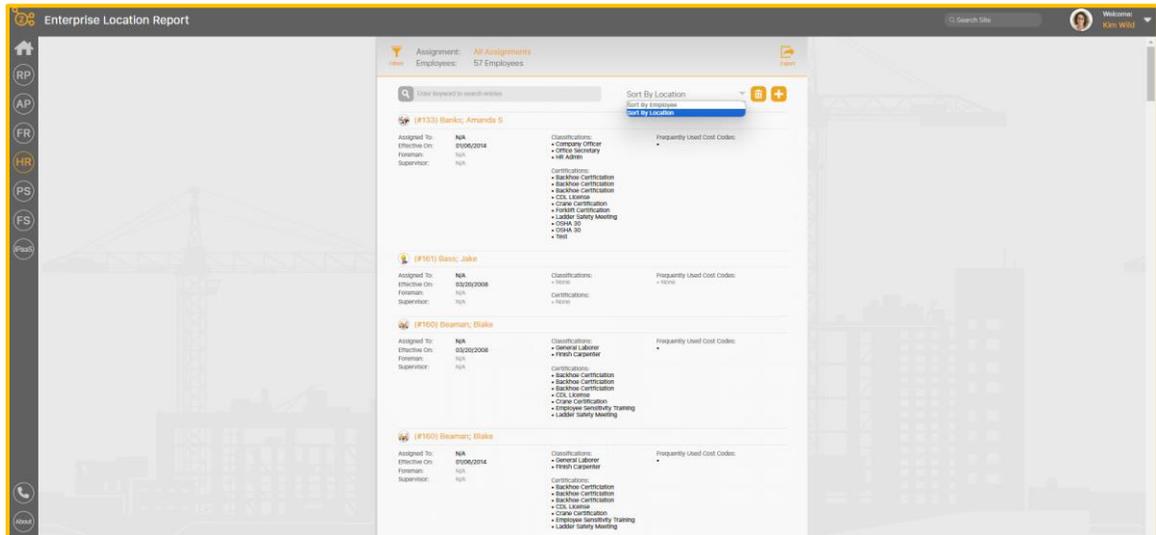
### To Export Classification Data to an Excel Spreadsheet:

1. Navigate to HR>Enterprise>Classifications.
2. Select the Export  icon in the top right corner.
3. An Excel Spreadsheet will automatically be created and can be found in the downloads folder of the user.

## Enterprise Location Report

This reporting feature allows for reporting on all employees' current job assignments. This report is designed to provide data on a company wide basis. However, reports may be run for single employees, as well.

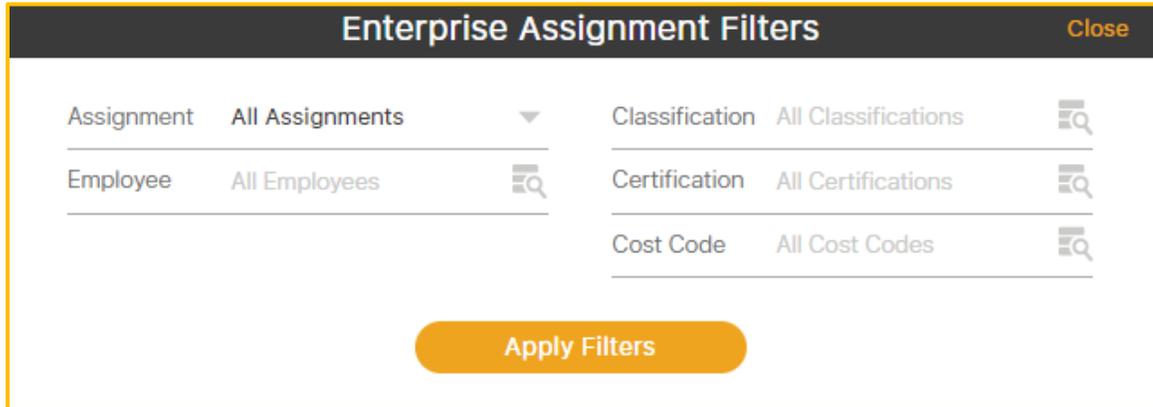
**Navigation: HR>Enterprise Reporting>Locations.**



- Location data can be searched for using the Search field.
- Location data can be sorted by Employee or Location.
- Location data can be filtered by Assignment, Employee, Classification, Certification and/or Cost Code.
- Location data can be added and deleted.
- Location data can be exported to either a PDF or an Excel spreadsheet.

### To Filter Location Data:

1. Navigate to HR>Enterprise>Locations.
2. Select the Filter  icon.

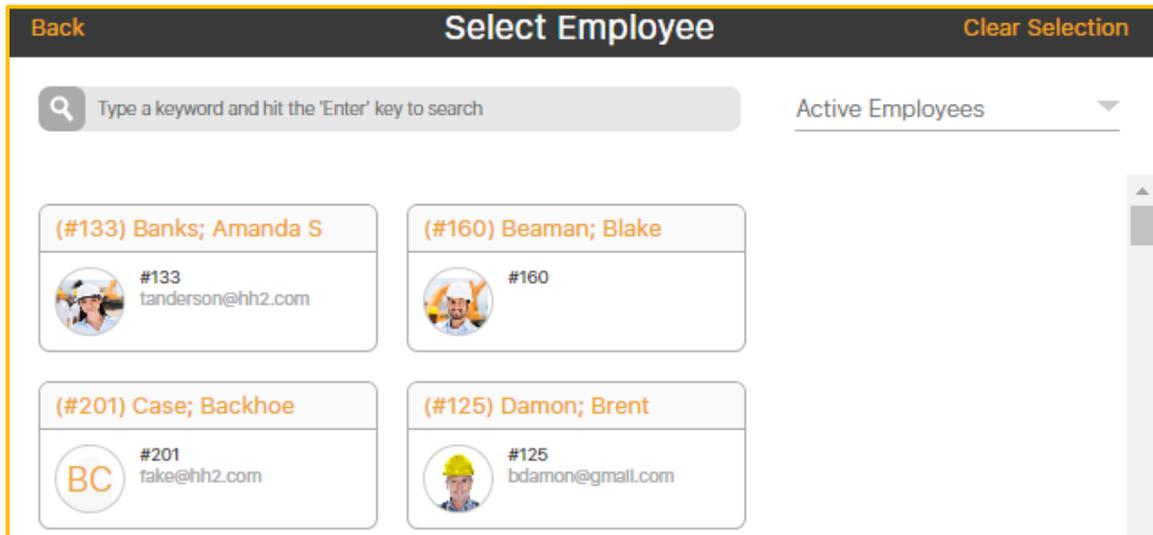


The screenshot shows a dialog box titled "Enterprise Assignment Filters" with a "Close" button in the top right corner. The dialog contains five filter categories, each with a dropdown menu and a magnifying glass icon:

Assignment	All Assignments	▼	Classification	All Classifications	
Employee	All Employees		Certification	All Certifications	
			Cost Code	All Cost Codes	

At the bottom of the dialog is a large orange button labeled "Apply Filters".

3. Select the Assignment from the Picklist (Job, Crew or Address Book Location).
4. In the next field that displays, select the Job, Crew or Address Book Location (based on the selection from the Assignment Picklist), using the Magnifying  icon.



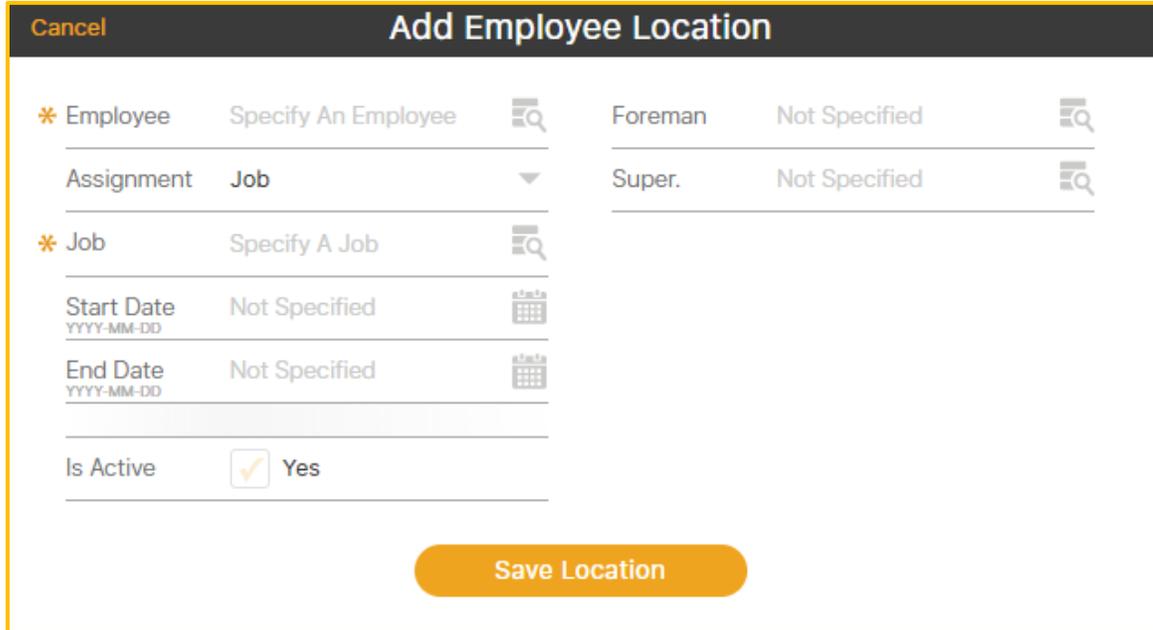
The screenshot shows a dialog box titled "Select Employee" with a "Back" button on the left and a "Clear Selection" button on the right. At the top, there is a search bar with the placeholder text "Type a keyword and hit the 'Enter' key to search" and a dropdown menu set to "Active Employees". Below the search bar, there are four employee cards, each with a magnifying glass icon in the top right corner:

- (#133) Banks; Amanda S**: #133, tanderson@hh2.com
- (#160) Beaman; Blake**: #160
- (#201) Case; Backhoe**: #201, fake@hh2.com
- (#125) Damon; Brent**: #125, bdamon@gmail.com

5. Select an employee using the Magnifying  icon.
6. Select a Classification using the Magnifying  icon, if applicable. Check if Primary.
7. Select a Certification using the Magnifying  icon, if applicable.
8. Select a Cost Code using the Magnifying  icon, if applicable.
9. Select Apply Filters.

### To Add Location Data:

1. Navigate to HR>Enterprise>Locations.
2. Select the Add  icon.



**Cancel** **Add Employee Location**

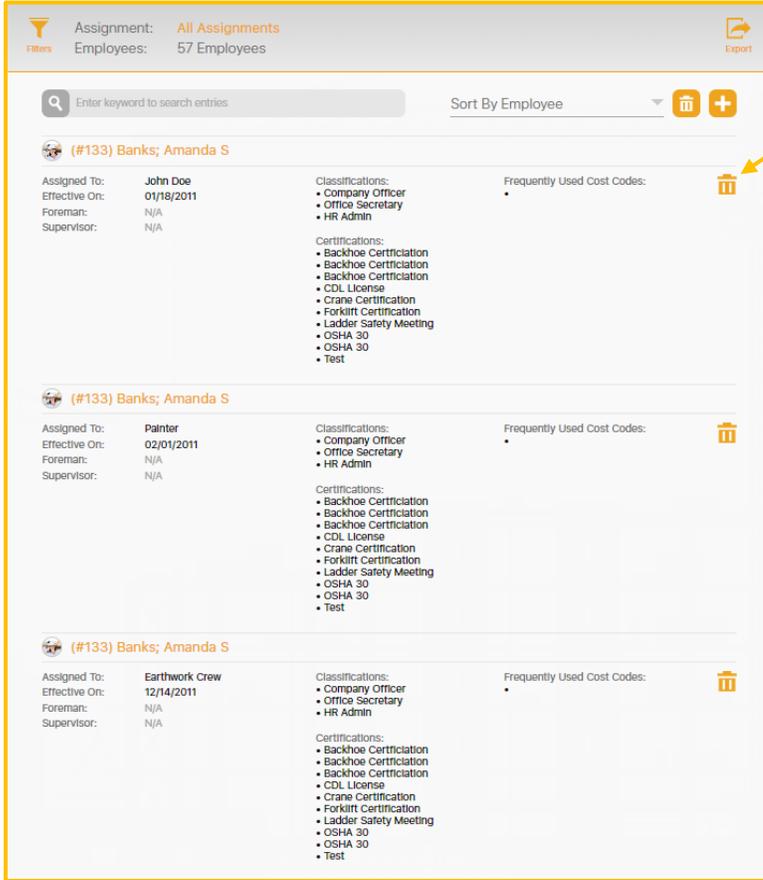
* Employee	Specify An Employee		Foreman	Not Specified	
Assignment	Job		Super.	Not Specified	
* Job	Specify A Job				
Start Date	Not Specified				
End Date	Not Specified				
Is Active	<input checked="" type="checkbox"/> Yes				

**Save Location**

3. Select the Employee using the Magnifying  icon.
4. Select the Assignment from the Picklist (Job, Crew or Address Book Location).
5. In the next field that displays, select the Job, Crew or Address Book Location based on the selection in the previous step, using the Magnifying  icon.
6. Select the Start and End Date.
7. Select Is Active (or not).
8. Select the Foreman and/or Supervisor using the Magnifying  icon.
9. Select Save Location.

## To Delete Location Data:

1. Navigate to HR>Enterprise>Location.
2. Select the Delete  icon.



Assignment: All Assignments  
Employees: 57 Employees

Enter keyword to search entries      Sort By Employee

(#133) Banks; Amanda S

Assigned To: John Doe	Classifications:	Frequently Used Cost Codes:
Effective On: 01/18/2011	• Company Officer	•
Foreman: N/A	• Office Secretary	
Supervisor: N/A	• HR Admin	
	Certifications:	
	• Backhoe Certification	
	• Backhoe Certification	
	• Backhoe Certification	
	• CDL License	
	• Crane Certification	
	• Forklift Certification	
	• Ladder Safety Meeting	
	• OSHA 30	
	• OSHA 30	
	• Test	

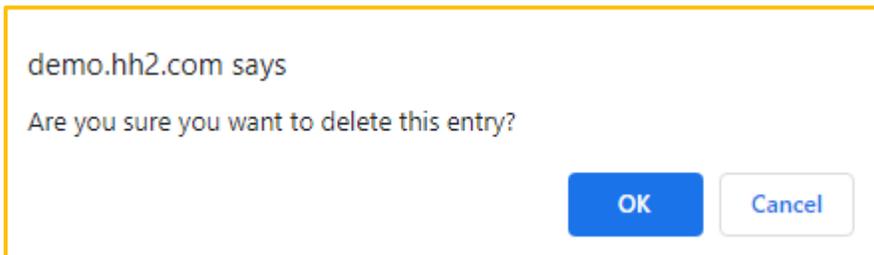
(#133) Banks; Amanda S

Assigned To: Painter	Classifications:	Frequently Used Cost Codes:
Effective On: 02/01/2011	• Company Officer	•
Foreman: N/A	• Office Secretary	
Supervisor: N/A	• HR Admin	
	Certifications:	
	• Backhoe Certification	
	• Backhoe Certification	
	• Backhoe Certification	
	• CDL License	
	• Crane Certification	
	• Forklift Certification	
	• Ladder Safety Meeting	
	• OSHA 30	
	• OSHA 30	
	• Test	

(#133) Banks; Amanda S

Assigned To: Earthwork Crew	Classifications:	Frequently Used Cost Codes:
Effective On: 12/14/2011	• Company Officer	•
Foreman: N/A	• Office Secretary	
Supervisor: N/A	• HR Admin	
	Certifications:	
	• Backhoe Certification	
	• Backhoe Certification	
	• Backhoe Certification	
	• CDL License	
	• Crane Certification	
	• Forklift Certification	
	• Ladder Safety Meeting	
	• OSHA 30	
	• OSHA 30	
	• Test	

3. Delete icons will now display next to all Locations.
4. Select the Delete  icon next to the Location(s) to delete.



demo.hh2.com says

Are you sure you want to delete this entry?

OK Cancel

5. Confirm the deletion by selecting Ok.
6. Select the Delete  icon to exit the delete mode.
7. The Location will be removed from the selected employees' records.

### **To Export Location Data to a PDF:**

1. Navigate to HR>Enterprise>Locations.
2. Filter data as needed, using the Filter  icon.
3. Select the Export  icon.
4. Select Export Data to PDF.
5. Depending on the browser and its settings, either the PDF will open automatically in a new tab for further downloading/printing, or it will automatically download to the user's device.

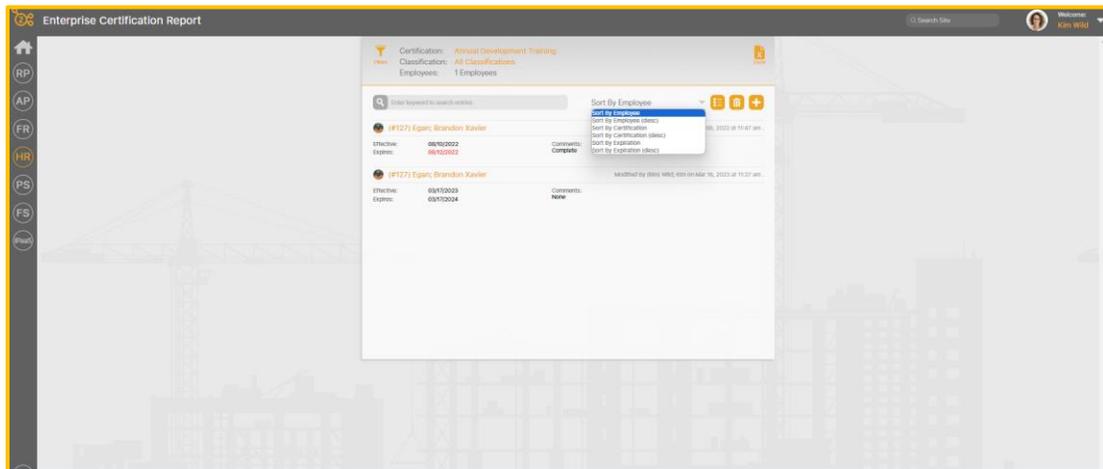
### **To Export Location Data to an Excel Spreadsheet:**

1. Navigate to HR>Enterprise>Locations.
2. Filter data as needed, using the Filter  icon.
3. Select the Export  icon.
4. Select Export Data to Excel.
5. The Excel spreadsheet will be in the user's download folder.

## Enterprise Certification Report

This reporting feature allows the user to report on employee certifications.

**Navigation: HR>Enterprise Reporting>Certifications.**



- Certification information may be searched by key word using the Search field.
- Certification information may also be sorted (in ascending or descending order) by Employee, Certification or Expiration Date.
- Certification information may be filtered by Certification, Status, Active or Inactive Employees, Classification and/or Primary Classification.
- Certification status may be viewed. This includes a list of employees who have never been certified or whose certification has expired.
- Certifications may be added and deleted.
- Certification data may be exported to an Excel spreadsheet for reporting purposes.

**Note:** Expired certifications display in red.

### To Filter Certification Data:

1. Navigate to HR>Enterprise>Certifications.
2. Select the Filter  icon.

### Enterprise Certification Filters Close

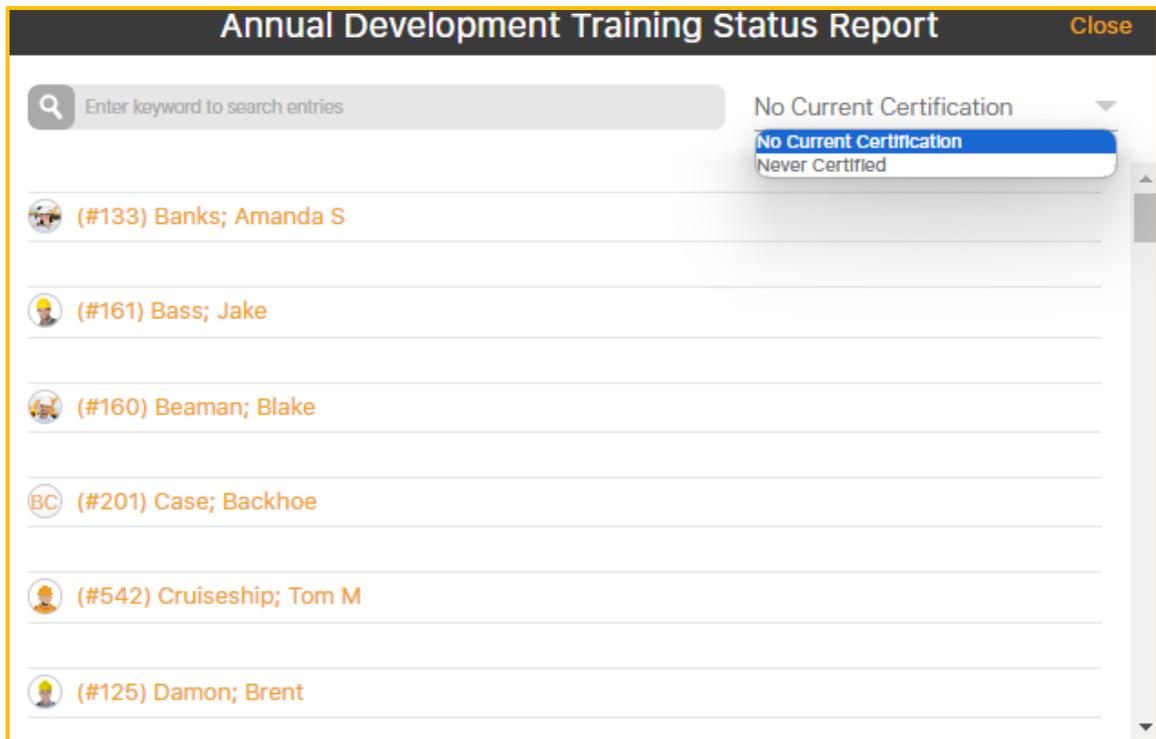
Certification	Annual Development Train 	Employees	<input type="checkbox"/> Include Inactive
Status	All Statuses 	Classification	All Classifications 
		Primary Only	<input type="checkbox"/> Yes

**Apply Filters**

3. Select the Certification using the Magnifying  icon.
4. Select a Status from the Picklist.
5. Check to include Inactive employees.
6. Select a Classification using the Magnifying  icon.
7. Check Primary Only to include only Primary Classifications.
8. Select Apply Filters.

### To View a Status Report for Certifications:

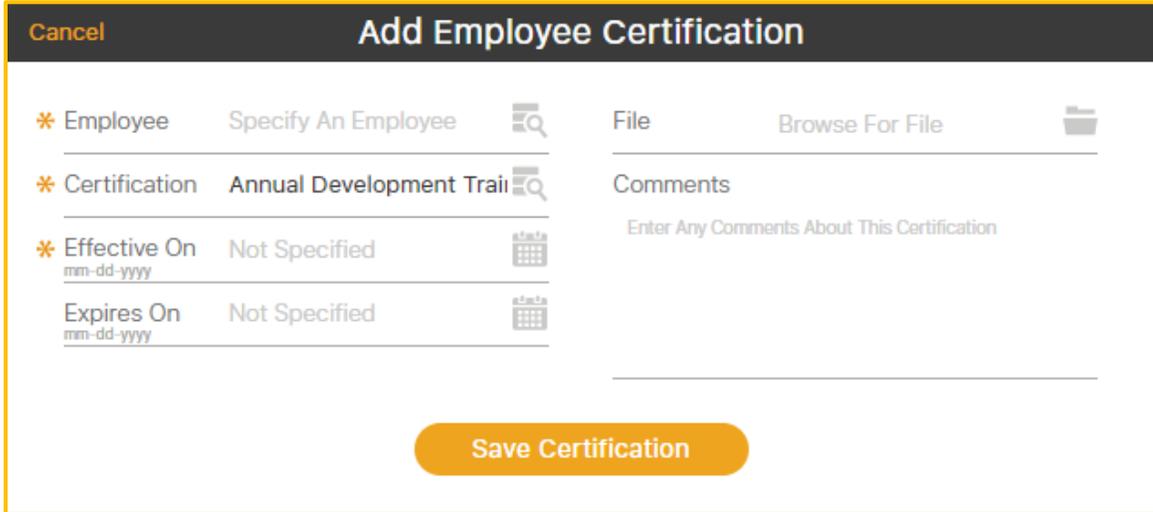
1. Navigate to HR>Enterprise>Certifications.
2. Filter the Certification data, using the Filter  icon.
3. Select the Status Report  icon. This icon will not enable until the data has been filtered.
4. The status of the specific Certification selected will be displayed based on the filters selected.
5. Certification data may be further filtered by selecting either No Current Certification or Never Certified from the Picklist.



6. Select Close.

### To Add a Certification to an Employee:

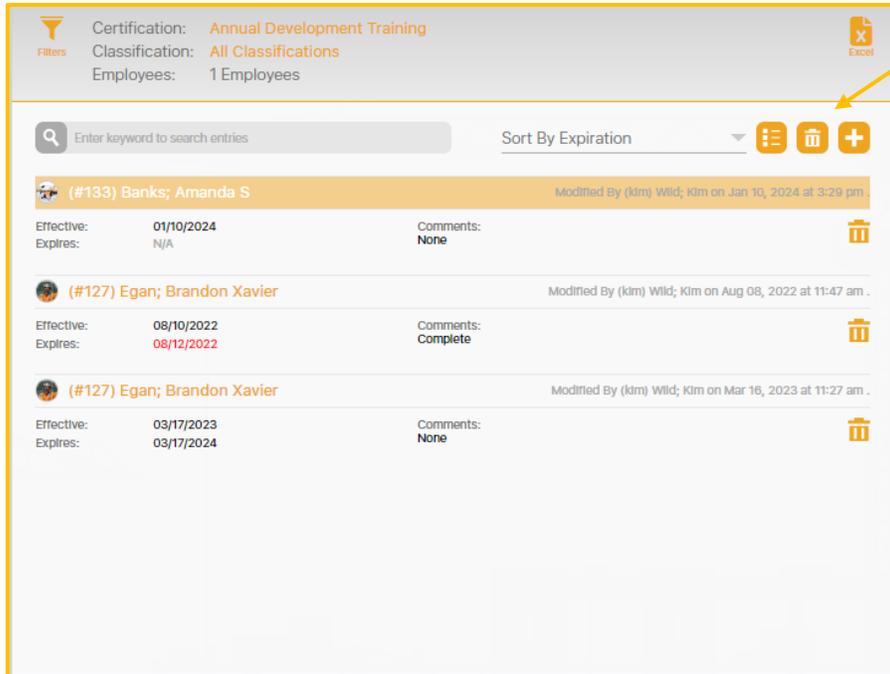
1. Navigate to HR>Enterprise>Certifications.
2. Select the Add  icon.



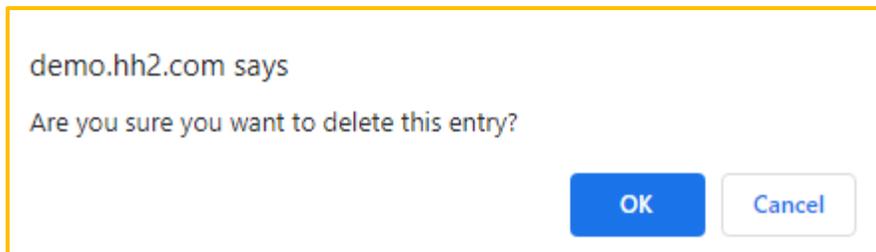
3. Select an Employee(s) using the Magnifying  icon.
4. Select Back.
5. Select the Certification using the Magnifying  icon.
6. Select an Effective On Date.
7. Select an Expires On Date, if applicable.
8. Select the File  icon.
9. Select the Certification to upload.
10. Select Open.
11. Enter any comments.
12. Select Save Certification.
13. The file will upload, and the Certification will be displayed.

## To Delete a Certification:

1. Navigate to HR>Enterprise>Certifications.
2. Select the Delete  icon.



3. Delete icons will now display next to all Certifications.
4. Select the Delete  icon next to the Certification(s) to delete.



5. Confirm the deletion by selecting Ok.
6. Select the Delete  icon to exit the delete mode.
7. The Certification(s) will be removed from the selected employees' records.

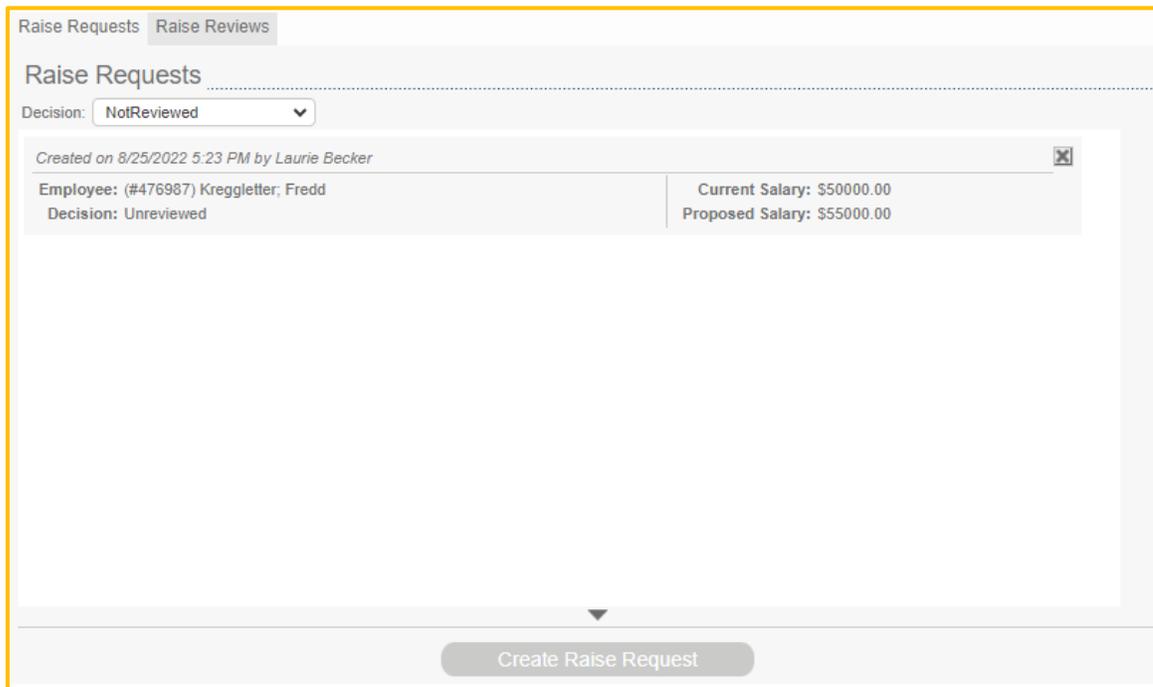
### To Export Certification Data to an Excel Spreadsheet:

1. Navigate to HR>Enterprise>Certifications.
2. Filter data as needed.
3. Select the Excel  icon.
4. Select the Download Excel  icon.
5. The Excel spreadsheet will be in the user's download folder.

## Raise Requests Reporting

This feature will allow the HR Manager/Administrator to manage all Raise Requests and Raise Reviews. Raise Requests are made from the Employee Record (HR>Employee Record>specific employee>Raise Request). Likewise, Raise Requests may be created from this location. Raise Requests can only be entered by users who have access to the Security Group to which an employee belongs. Once submitted, the request for an employee to receive a raise can be managed and put through a review process known as Raise Reviews.

**Navigation: HR>Enterprise Reporting>Raise Requests.**

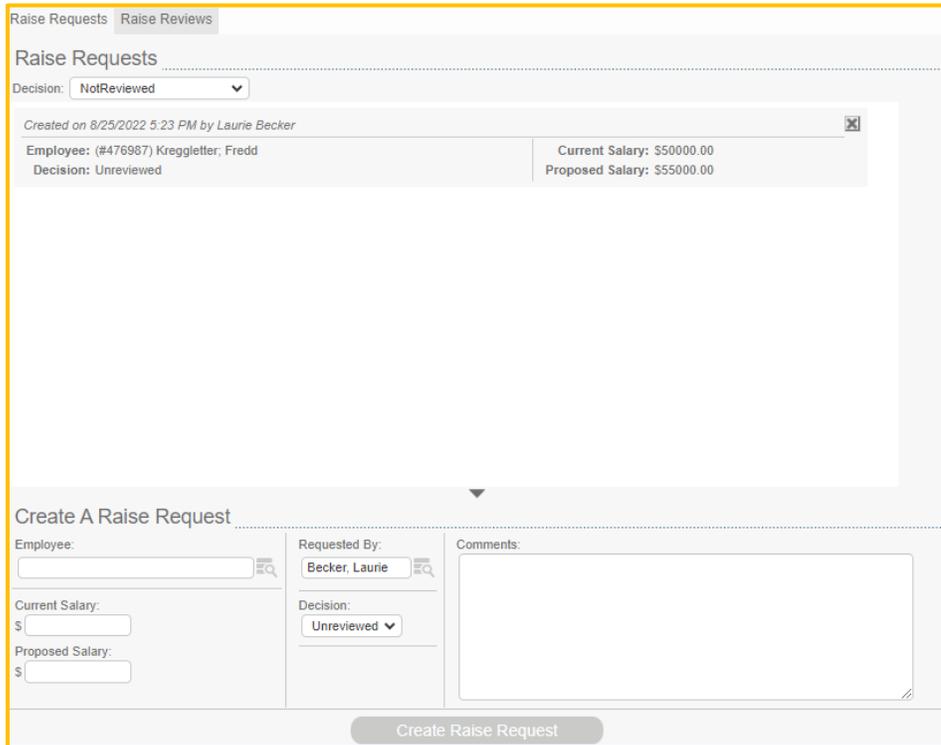


The screenshot displays the 'Raise Requests' interface. At the top, there are two tabs: 'Raise Requests' (active) and 'Raise Reviews'. Below the tabs, the title 'Raise Requests' is followed by a 'Decision:' dropdown menu set to 'NotReviewed'. A message indicates the request was 'Created on 8/25/2022 5:23 PM by Laurie Becker'. Below this, a table shows employee details: 'Employee: (#476987) Kreggletter, Fredd' with 'Decision: Unreviewed', and 'Current Salary: \$50000.00' with 'Proposed Salary: \$55000.00'. At the bottom, there is a 'Create Raise Request' button.

- Raise Requests can be sorted by Decision (None, Not Reviewed, Reviewed and Unapproved, Not Approved, or Approved).
- Raise Requests can be added, edited, and deleted.
- Raise Reviews can be added, approved, and declined.

## To Add a Raise Request:

1. Navigate to HR>Enterprise Reporting>Raise Requests. Raise Requests may also be added on the Employee Record.
2. Select the Raise Requests tab.



The screenshot displays the 'Raise Requests' interface. At the top, there are tabs for 'Raise Requests' and 'Raise Reviews'. Below the tabs, the 'Raise Requests' section shows a list of requests. One request is visible, created on 8/25/2022 5:23 PM by Laurie Becker. The employee is (#476987) Kreggletter, Fredd. The current salary is \$50,000.00 and the proposed salary is \$55,000.00. The decision is 'Unreviewed'. Below the list, there is a 'Create A Raise Request' form. The form has several fields: 'Employee' (with a magnifying glass icon), 'Current Salary' (with a dollar sign and input field), 'Proposed Salary' (with a dollar sign and input field), 'Requested By' (with a dropdown menu showing 'Becker, Laurie' and a magnifying glass icon), 'Decision' (with a dropdown menu showing 'Unreviewed'), and 'Comments' (with a text area). A 'Create Raise Request' button is located at the bottom of the form.

3. Select Create Raise Request.
4. Select the Employee using the Magnifying  icon.
5. Enter a Current Salary.
6. Enter a Proposed Salary.
7. Select the user requesting the raise using the Magnifying  icon (auto fills with the current logged in user) in the Requested By field.
8. Select the status of the request (Unreviewed, Approved, or Declined) in the Decision field.
9. Enter any Comments.
10. Select Create Raise Request.

**Note:** An Invalid Permissions message will appear if the user does not have access to the Security Group to which the employee belongs.

### To Edit a Raise Request:

1. Navigate to HR>Enterprise Reporting>Raise Requests.
2. Select the Raise Requests tab.
3. Click on the Raise Request.

Raise Requests | Raise Reviews

#### Raise Requests

Decision: NotReviewed

Created on 8/25/2022 5:23 PM by Laurie Becker

Employee: (#476987) Kreggletter, Fredd	Current Salary: \$50000.00
Decision: Unreviewed	Proposed Salary: \$55000.00

#### Edit A Raise Request

Employee: (#476987) Kreggletter, Fredd

Requested By: Becker, Laurie

Current Salary: \$ 50000.00

Proposed Salary: \$ 55000.00

Decision: Unreviewed

Manage Reviewers

Comments:

Finished

4. Make any necessary modifications in the Edit A Raise Request section.
5. Select Finished.

### To Delete a Raise Request:

1. Navigate to HR>Enterprise Reporting> Raise Requests.
2. Select the Raise Requests tab.
3. Select the X next to the Raise Request.

**?** Confirm

Are you sure you wish to DELETE this raise request?

Yes No

4. Select Yes.

## To Create a Raise Review Request:

Raise Requests are used to enter a request to grant an employee a raise, while Raise Reviews are designed to create a review process for the granting of a raise to an employee. This process will add individuals to the list of reviewers and request their review.

1. Navigate to HR>Enterprise Reporting>Raise Requests.
2. Select the Raise Reviews tab.
3. Select a specific Raise Request.

The screenshot displays the 'Raise Requests' interface. At the top, there are tabs for 'Raise Requests' and 'Raise Reviews'. Below the tabs, the 'Raise Requests' section is active, showing a dropdown menu for 'Decision' set to 'NotReviewed'. A list of three requests is shown, each with a 'Created on' timestamp, employee name, decision status, current salary, and proposed salary. Below the list is an 'Edit A Raise Request' form. The form includes fields for 'Employee' (set to '#108) Brock; Terry T'), 'Requested By' (set to 'Admin, hh2'), 'Current Salary' (set to '\$ 72000.00'), 'Proposed Salary' (set to '\$ 74000.00'), and 'Decision' (set to 'Unreviewed'). There is a 'Manage Reviewers' button and a 'Comments' text area. A 'Finished' button is located at the bottom of the form.

Created on	Employee	Decision	Current Salary	Proposed Salary
2/22/2024 5:51 PM by hh2 Admin	(#108) Brock; Terry T	Unreviewed	\$72000.00	\$74000.00
2/13/2024 2:15 AM by hh2 Admin	(#JDUTTON) Dutton; John	Unreviewed	\$12.00	\$15.00
2/13/2024 2:04 AM by hh2 Admin	(#119) Brooks; Tom B,Jr	Unreviewed	\$15.00	\$20.00

**Edit A Raise Request**

Employee: (#108) Brock; Terry T  
Requested By: Admin, hh2  
Current Salary: \$ 72000.00  
Proposed Salary: \$ 74000.00  
Decision: Unreviewed  
Manage Reviewers  
Comments:  
Finished

4. Select Manage Reviewers.

Employee Record for (#108) Brock; Terry T

Employee: (#108) Brock; Terry T

Hire Date: 5/11/2008  
 Classifications: Carpenter  
 Current Location: none

Last Edited By: hh2 Admin  
 On: Thu, Feb 22 2024 09:49 AM

Employee Address:  
 Beaverton, OR 97005  
 Ph. (503)828-8485  
 Em.

Inf Cla Loc Cer Eva **Rai** Ben Dis Edu Pay His Acc Hir Ter Doc

Requests | Reviews

Raise Request Review

Reviewers:  
 No reviewers specified

Submitted Reviews:  
 There are no reviews submitted for the most recent request.

Search icon Add

Create Review

5. The employee's information will now appear at the top of the page.
6. From the Raise Request Review section, select the Magnifying  icon to choose Reviewers for the request.
7. Select the Reviewer with a click and Close.

Select User

[All] ABCDEFGHJLMPSTW

- Admin, Admin
- Admin, Clayton
- Admin, Dan
- Admin, Matt
- Admin, Meghan
- Admin, Sam
- Aldridge, Devin
- Anadmin, lam
- Backmann, John
- Brock, Terry

8. Select Add.
9. Repeat steps 6 through 8 to add additional Reviewers.

**Employee Record for (#137) Black; Donald J**

<b>Employee:</b> (#137) Black; Donald J	No Image Provided	<b>Last Edited By:</b> Laurie Becker On: Tue, Jul 26 2022 09:01 AM
Hire Date: 4/1/2008 Classifications: none Current Location: none		<b>Employee Address:</b> Portland, OR 97224 Ph. (503)225-6132 Em.

**Raise Request Review**

<b>Reviewers:</b> ● Brown, Stanley	<b>Submitted Reviews:</b> Assigned To <b>Stanley Brown</b> On 2/22/2024 2:35 PM Approved: Unreviewed Comments: none
---------------------------------------	--

10. Reviewers will be sent an email notification.
11. The Date and Time stamp of the review assignment displays on the Reviews tab.

### To Remove a Reviewer:

1. Navigate to HR>Enterprise Reporting>Raise Requests.
2. Select the Reviews tab.
3. Select the Reviewer.
4. Select the X next to the reviewer's name.



5. Select Yes.

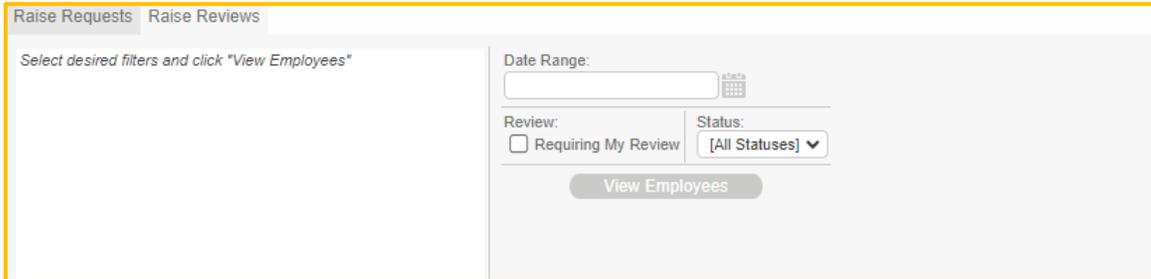
### To Remind a Reviewer to Submit a Review:

1. Navigate to HR>Enterprise Reporting>Raise Requests.
2. Select the Reviews tab.
3. Select the Reviewer.
4. Select ! next to the reviewer's name.
5. This action will send an email notification to the reviewer prompting them to review the Raise Request.

## To Review Raise Requests:

Once a user (typically someone in a management or supervisory position) is requested to review a Raise Request, they will need to approve or decline the request.

1. Navigate to HR>Enterprise Reporting>Raise Requests.
2. Select the Raise Reviews tab.



Raise Requests | Raise Reviews

Select desired filters and click "View Employees"

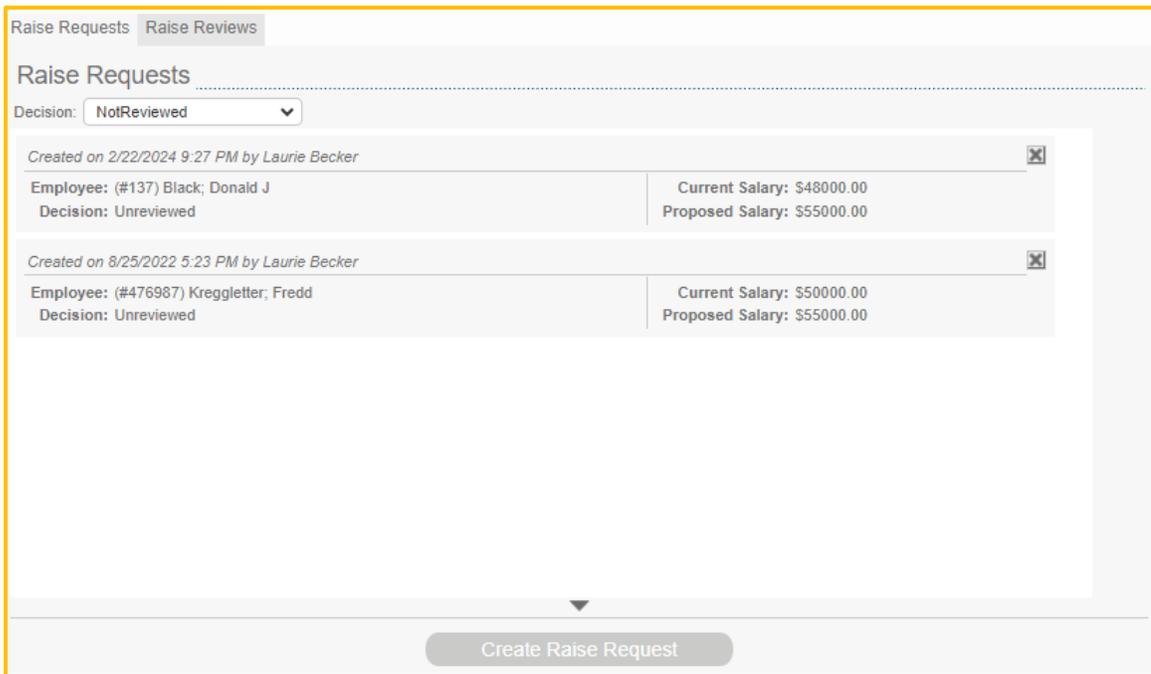
Date Range:  

Review:  Requiring My Review

Status: [All Statuses] ▼

View Employees

3. Select a Date Range, Requiring My Review (used to filter only reviews requiring the user's attention), or a Status from the Picklist to filter information.
4. Select View Employees.



Raise Requests | Raise Reviews

Raise Requests

Decision: NotReviewed ▼

<i>Created on 2/22/2024 9:27 PM by Laurie Becker</i> 	
Employee: (#137) Black; Donald J Decision: Unreviewed	Current Salary: \$48000.00 Proposed Salary: \$55000.00
<i>Created on 8/25/2022 5:23 PM by Laurie Becker</i> 	
Employee: (#476987) Kreggletter; Fredd Decision: Unreviewed	Current Salary: \$50000.00 Proposed Salary: \$55000.00

Create Raise Request

5. Select the specific employee with a click.

6. The Edit A Review section appears.

The screenshot shows a web application interface for managing raise requests. At the top, there are two tabs: 'Raise Requests' (active) and 'Raise Reviews'. Below the tabs, the 'Raise Requests' section displays a list of requests. The first request is for employee Black, Donald J, created on 2/22/2024 9:27 PM by Laurie Becker. It shows a current salary of \$48,000.00 and a proposed salary of \$55,000.00, with a decision of 'Unreviewed'. The second request is for employee Kreggletter, Fredd, created on 8/25/2022 5:23 PM by Laurie Becker, with a current salary of \$50,000.00 and a proposed salary of \$55,000.00, also with a decision of 'Unreviewed'. Below the list is the 'Edit A Raise Request' section. It includes fields for 'Employee' (filled with '#137) Black; Donald J'), 'Requested By' (filled with 'Becker, Laurie'), and 'Decision' (a dropdown menu set to 'Unreviewed'). There are also input fields for 'Current Salary' (\$ 48000.00) and 'Proposed Salary' (\$ 55000.00). A 'Comments' text area is present, and a 'Manage Reviewers' button is located below the decision dropdown. At the bottom of the form is a 'Finished' button.

7. Select the decision (Approve or Decline) regarding the raise from the Picklist in the Decision field.
8. Make any comments.
9. Select Finished.

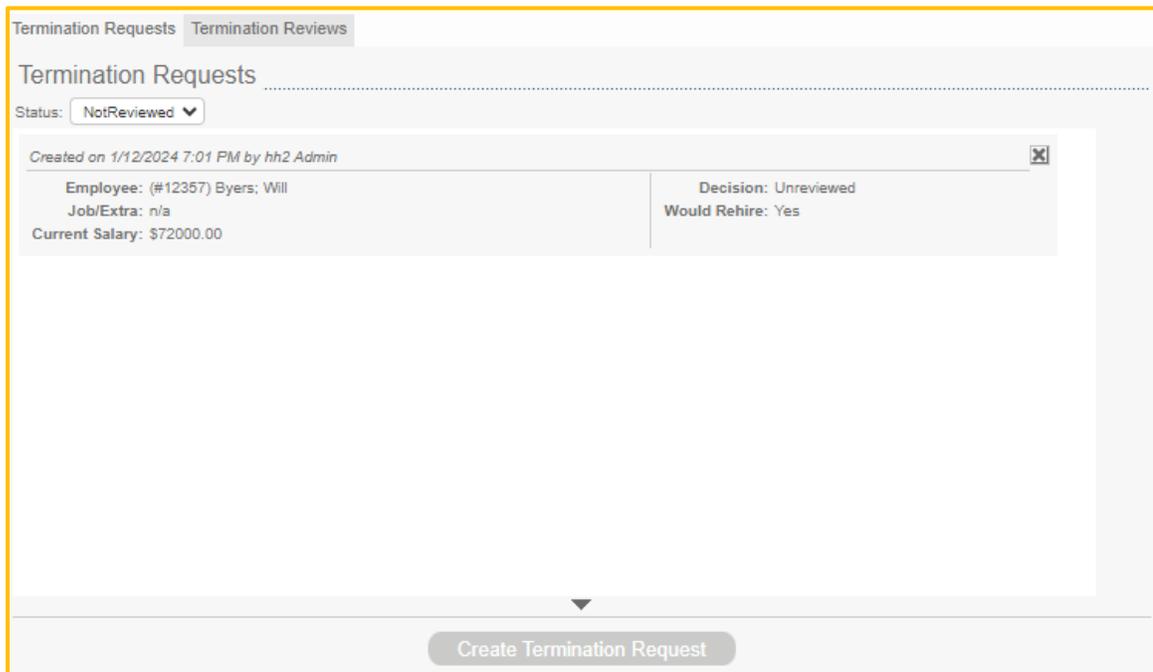
**To Delete a Raise Review:**

1. Navigate to HR>Enterprise Reporting>Raise Review.
2. Select the Raise Reviews tab.
3. Select View Employees.
4. Select an employee.
5. Select the X next to the Raise Review in the Submitted Reviews section.

## Termination Requests Reporting

This feature will allow the HR Manager/Administrator to manage all Termination Requests and Termination Reviews. Termination Requests are made from the Employee Record (HR>Employee Record>Specific Employee>Termination Request). Likewise Termination Requests may be created from this location. Once entered, the termination can be managed here. Termination requests can only be entered by users who have access to the Security Group to which an employee belongs.

**Navigation: HR>Enterprise Reporting>Termination Requests.**



The screenshot displays the 'Termination Requests' section of a software interface. At the top, there are two tabs: 'Termination Requests' (active) and 'Termination Reviews'. Below the tabs, the title 'Termination Requests' is followed by a status filter dropdown set to 'NotReviewed'. A card displays details for a request created on 1/12/2024 at 7:01 PM by 'hh2 Admin'. The card is divided into two columns: the left column lists 'Employee: (#12357) Byers, Will', 'Job/Extra: n/a', and 'Current Salary: \$72000.00'; the right column lists 'Decision: Unreviewed' and 'Would Rehire: Yes'. A 'Create Termination Request' button is located at the bottom center of the interface.

- Termination data can be sorted by Status (None, Not Reviewed, Reviewed, Denied or Approved).
- Termination Requests can be added, edited, and deleted.
- Termination Reviews can be added, approved, and declined.

### To Add a Termination Request:

1. Navigate to HR>Enterprise Reporting>Termination Requests. Termination Requests may also be added on the Employee Record.
2. Select the Termination Requests tab.

The screenshot displays the 'Termination Requests' interface. At the top, there are two tabs: 'Termination Requests' (selected) and 'Termination Reviews'. Below the tabs, the title 'Termination Requests' is followed by a dotted line. A 'Status:' dropdown menu is set to 'NotReviewed'. A light gray box contains the following information: 'Created on 1/12/2024 7:01 PM by hh2 Admin' with a close icon; 'Employee: (#12357) Byers, Will'; 'Job/Extra: n/a'; 'Current Salary: \$72000.00'; 'Decision: Unreviewed'; and 'Would Rehire: Yes'. At the bottom of the interface, there is a 'Create Termination Request' button.

3. Select Create Termination Request.

Termination Requests    Termination Reviews

### Termination Requests

Status: **NotReviewed** ▼

Created on 1/12/2024 7:01 PM by hh2 Admin

Employee: (#12357) Byers, Will Job/Extra: n/a Current Salary: \$72000.00	Decision: Unreviewed Would Rehire: Yes
--	---

---

#### Reasons for Termination

Employee: <input type="text"/>	<input type="checkbox"/> Would Rehire	Comments: <div style="border: 1px solid #ccc; height: 60px;"></div>
Job/Extra: <input type="text"/>	Requested By: Admin, hh2	
Current Salary: \$ <input type="text"/>	Decision: Unreviewed ▼	
<b>Create Termination Request</b>		

4. Select the Employee using the Magnifying  icon.
5. Select a Job/Extra using the Magnifying  icon.
6. Enter a Current Salary.
7. Check **Would Rehire** if the employee is eligible for rehire.
8. Select who requested the termination by using the Picklist in the **Requested By** field.
9. Select a Decision from the Picklist in the **Decision** field.
10. Enter any comments.
11. Select **Create Termination Request**.

**Note:** An Invalid Permissions message will appear if the user does not have access to the Security Group to which the employee belongs.

### To Edit a Termination Request:

1. Navigate to HR>Enterprise Reporting>Termination Requests.
2. Select the Termination Requests tab.
3. Click on the Termination Request.
4. Make any necessary modifications.
5. Select Finished.

### To Delete a Termination Request:

1. Navigate to HR>Enterprise Reporting>Termination Requests.
2. Select the Termination Requests tab.
3. Select the X next to the Termination Request.

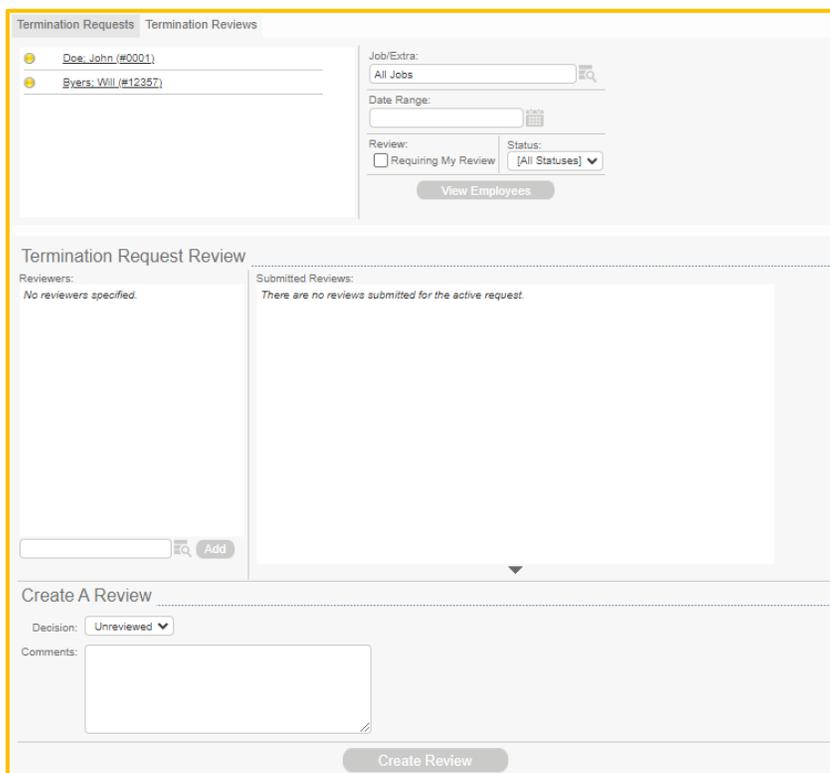


4. Select Yes.

## To Create a Termination Review Request

Termination Requests are used to enter a request to terminate an employee, while Termination Review Requests are designed to create a review process for the termination of an employee. This process will add individuals to the list of reviewers.

1. Navigate to HR>Enterprise Reporting>Termination Requests.
2. Select the Termination Reviews tab.
3. Filter as needed using the Job/Extra, Date Range, Requiring My Review and Status fields.
4. Select View Employees.

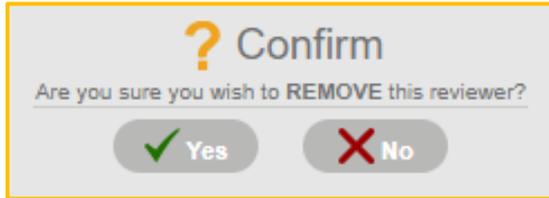


The screenshot displays the 'Termination Reviews' interface. At the top, there are two tabs: 'Termination Requests' and 'Termination Reviews'. Below the tabs, there are two columns of filters. The left column contains two employee entries: 'Doe, John (#0001)' and 'Byers, Will (#12357)'. The right column contains filters for 'Job/Extra' (set to 'All Jobs'), 'Date Range' (with a calendar icon), 'Review' (with a checkbox for 'Requiring My Review'), and 'Status' (set to '[All Statuses]'). A 'View Employees' button is located below these filters. Below the filters, there is a section titled 'Termination Request Review' with two sub-sections: 'Reviewers' (showing 'No reviewers specified') and 'Submitted Reviews' (showing 'There are no reviews submitted for the active request.'). At the bottom of the 'Reviewers' section, there is a search bar with a magnifying glass icon and an 'Add' button. Below this, there is a 'Create A Review' section with a 'Decision' dropdown (set to 'Unreviewed') and a 'Comments' text area. A 'Create Review' button is located at the bottom of the page.

5. Select the employee to review with a click.
6. Use the Magnifying  icon to search for a reviewer in the Reviewers section.
7. Select the reviewer's name.
8. Select Add.
9. Repeat as needed to add additional reviewers.

### To Remove a Reviewer:

1. Navigate to HR>Enterprise Reporting>Termination Requests.
2. Select the Termination Reviews tab.
3. Select the X next to the reviewer's name.



4. Select Yes.

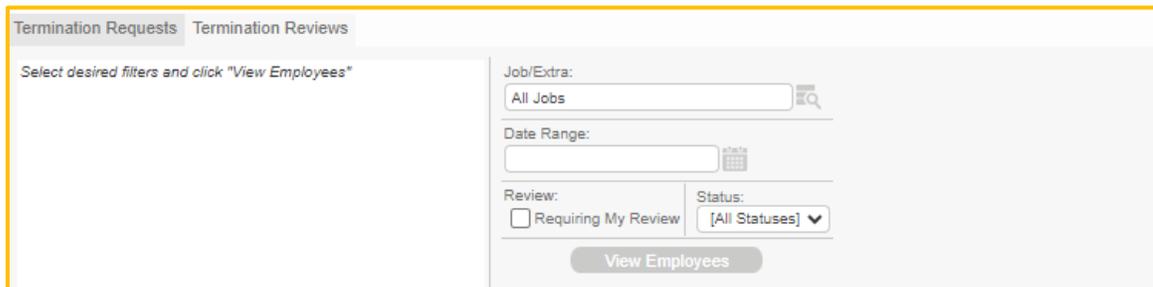
### To Remind a Reviewer to Submit a Review:

1. Navigate to HR>Enterprise Reporting>Termination Requests.
2. Select the Termination Reviews tab.
3. Select ! next to the reviewer's name.
4. This action will send an email notification to the reviewer prompting them to review the Termination Request.

## To Review Termination Requests:

Once an employee (typically someone in a management or supervisory position) is requested to review a Termination Request, they will need to approve or decline the request.

1. Navigate to HR>Enterprise Reporting>Termination Requests.
2. Select the Termination Reviews tab.



The screenshot shows a web interface for 'Termination Reviews'. At the top, there are two tabs: 'Termination Requests' and 'Termination Reviews', with the latter being selected. Below the tabs, there is a large empty box on the left with the text 'Select desired filters and click "View Employees"'. To the right of this box are several filter controls: a 'Job/Extra:' dropdown menu with 'All Jobs' selected and a search icon; a 'Date Range:' field with a calendar icon; a 'Review:' section with a checkbox for 'Requiring My Review' (which is unchecked); and a 'Status:' dropdown menu with '[All Statuses]' selected. At the bottom of the filter section is a 'View Employees' button.

3. Select a Job/Extra, Date Range, Requiring My Review (used to filter only reviews requiring the user's attention), or a Status from the Picklist to filter information.
4. Select View Employees.

Termination Requests Termination Reviews

Doe, John (#0001)  
 Byers, Will (#1235Z)

Job/Extra: All Jobs

Date Range:

Review:  Requiring My Review Status: [All Statuses]

View Employees

---

Termination Request Review

Reviewers:

- Admin, hh2
- Admin, Sam
- Admin, Clayton
- Admin, Dan

Submitted Reviews:

- Reviewed By hh2 Admin On 1/12/2024 12:37 PM
- Approved: Unreviewed
- Comments:
- Reviewed By Sam Admin On 1/12/2024 12:38 PM
- Approved: Unreviewed
- Comments:
- Reviewed By Clayton Admin On 1/12/2024 1:21 PM
- Approved: Unreviewed
- Comments:
- Reviewed By Dan Admin On 1/12/2024 1:22 PM
- Approved: Unreviewed
- Comments:

Search Add

Create Review

- Any employees with Termination Reviews marked as Declined will have a red dot next to their name. Employees with Reviews marked as Unreviewed will have a yellow dot next to their name. Once all of an employee's reviews have been marked as Approved, a green dot will appear next to their name.
- Select the specific employee with a click. If a review exists, it will be displayed here.
- With a click, select the Submitted Review in the right section that is associated with the Reviewer listed in the left section.

Termination Requests Termination Reviews

Doe, John (#0001)  
 Byers, Will (#12357)

Job/Extra: All Jobs

Date Range:

Review:  Requiring My Review

Status: [All Statuses]

View Employees

---

Termination Request Review

Reviewers:

- Admin, hh2
- Admin, Sam
- Admin, Clayton
- Admin, Dan

Submitted Reviews:

Reviewed By hh2 Admin On 1/12/2024 12:37 PM

Approved: Unreviewed

Comments:

Reviewed By Sam Admin On 1/12/2024 12:38 PM

Approved: Unreviewed

Comments:

Reviewed By Clayton Admin On 1/12/2024 1:21 PM

Approved: Unreviewed

Comments:

Reviewed By Dan Admin On 1/12/2024 1:22 PM

Approved: Unreviewed

Comments:

Add

---

Edit A Review

Decision: Unreviewed

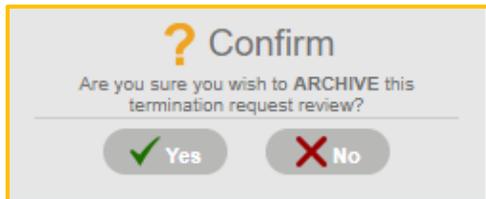
Comments:

Finished

- The Edit A Review section appears.
- Select the decision (Approve or Decline) regarding the termination from the Picklist in the Decision field.
- Make any comments.
- Select Finished.

### To Delete a Termination Review:

1. Navigate to HR>Enterprise Reporting>Termination Review.
2. Select the Termination Reviews tab.
3. Select View Employees.
4. Select an employee.
5. Select the X next to the Termination Review in the Submitted Reviews section.

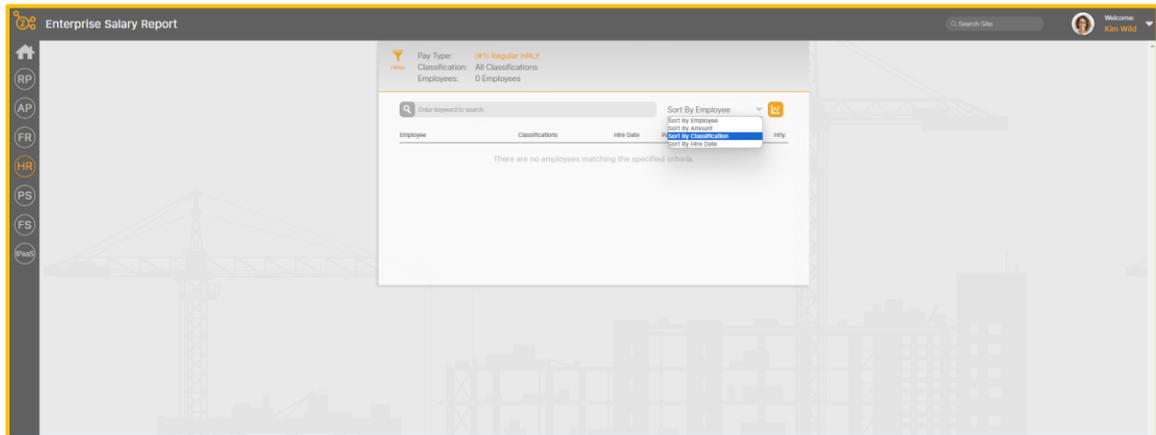


6. Select Yes.

## Enterprise Employee Pay (Salary Report)

The Enterprise Salary Report allows the user to review, and chart pay rates across the construction company.

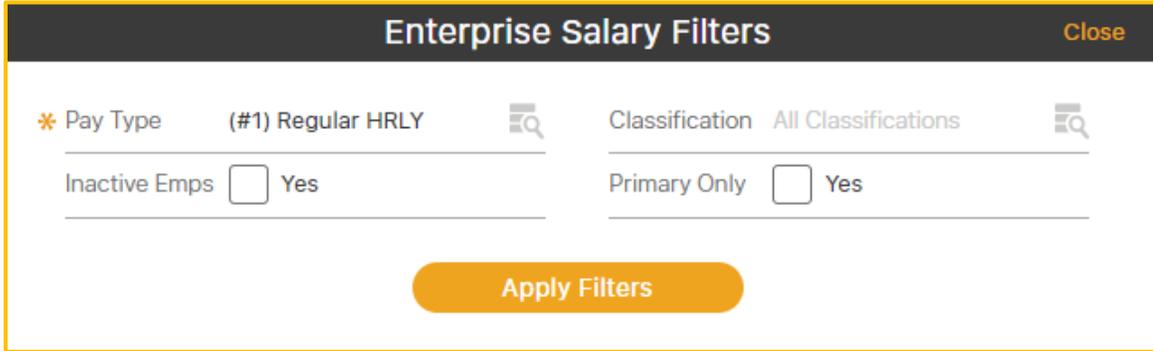
**Navigation: HR>Enterprise>Employee Pay.**



- Employee Pay information may be searched by key word using the Search field.
- Employee Pay information may also be sorted Employee, Amount, Classification and Hire Date.
- Employee Pay information may be filtered by Pay Type, Inactive Employees, Classification, and/or Primary Classification Only.
- Employee Pay information may be charted.

### To Filter Employee Pay Information:

1. Navigate to HR>Enterprise>Employee Pay.
2. Select the Filter  icon.



**Enterprise Salary Filters** Close

\* Pay Type (#1) Regular HRLY  Classification All Classifications 

Inactive Emps  Yes Primary Only  Yes

**Apply Filters**

3. Select the Pay Type by using the Magnifying  icon.
4. Select the Pay Type.
5. Check to Inactive Emps to include Inactive Employees.
6. Select a Classification using the Magnifying  icon.
7. Select the Classification.
8. Check Primary Only to include on Primary Classifications.
9. Select Apply Filters.

### To Edit an Employee's Pay:

1. Navigate to HR>Enterprise>Employee Pay.
2. Click the Employee's name.
3. The user will be redirected to the employee's record where the pay information may be edited.

TH < (#0222) Holland; Tom > Employed since: Apr 29, 2021 (3 years ago)  
Employment: N/A  
Residence: N/A

Hires Term. Requests Education Pay/Salary Payroll History Accruals Documents Notes

Enter keyword to search entries Active Pay Types

(#1) Regular Hourly Pay Modified By (hh2\_admin) Admin; hh2 on Feb 13, 2024 at 8:02 am .

Amount: **\$975.00** Period: N/A Past Amounts: None  
Effective: Feb 12, 2024 Frequency: Weekly  
Expires: Not Specified Calculation: Default  
Limit: N/A  
Automatic: Yes

4. Select the record.
5. Make any modifications on the Edit Employee Salary Page.

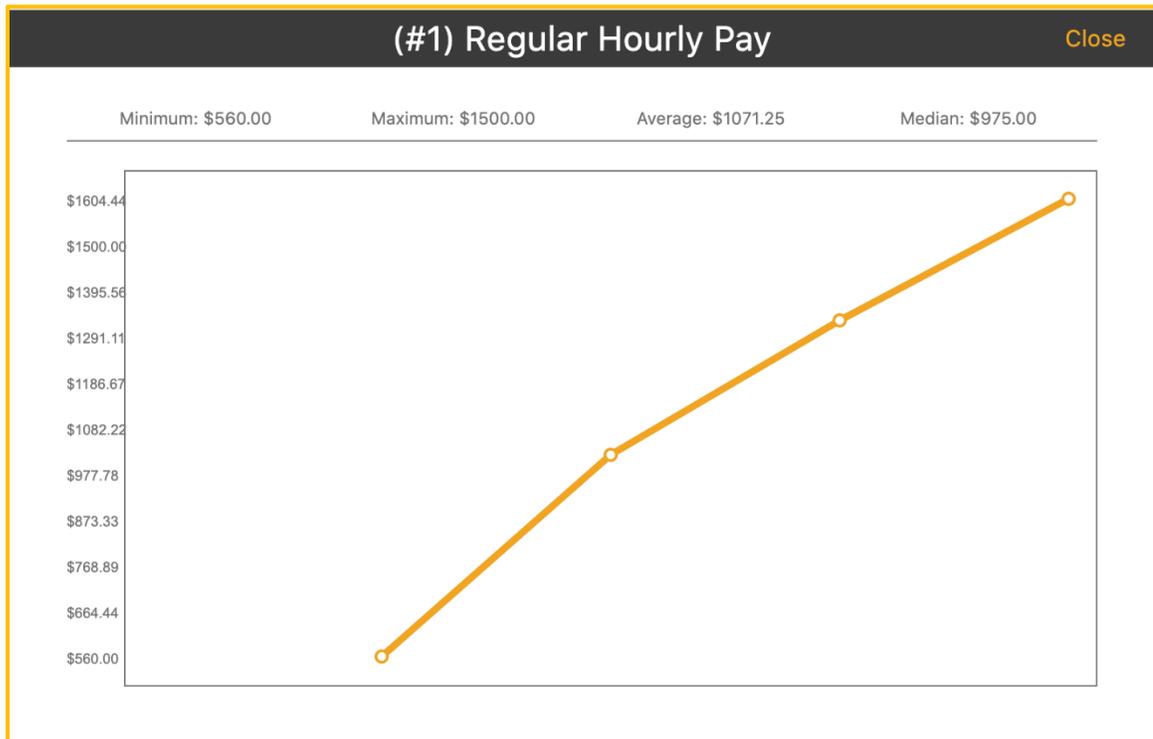
**Edit Employee Salary** Close

\* Pay Type (#1) Regular Hourly Pay \* Period No Period  
\* Amount (\$) 975.00 \* Frequency Weekly  
Limit (\$) 0.00 \* Calc. Method Default  
Is Automatic  Yes  
\* Effective On 02-12-2024  
Expires On Not Specified

6. The Ajax check mark will indicate the change was accepted.
7. Select Close.

### To Chart Employee Pay Information:

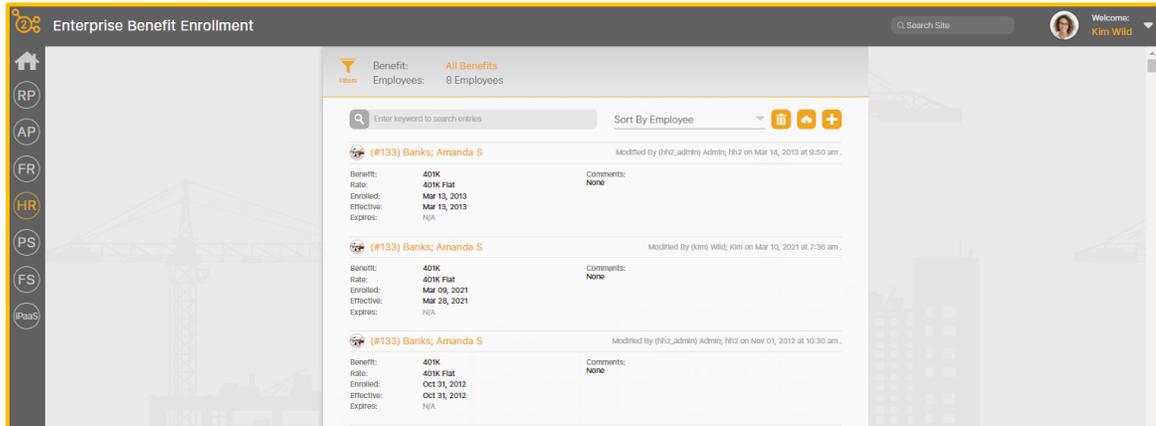
1. Navigate to HR>Enterprise>Employee Pay.
2. Filter Employee Pay data, as needed.
3. Select the Chart  icon.
4. A point will be made on the chart for each employee pay used in creating the chart. Along the top of the chart also displays the minimum, maximum, average, and median pays.



## Enterprise Benefit Enrollment

This feature allows for review of Benefit Enrollment. The user may filter benefit enrollment data, add benefits to employees, delete benefits and reconcile enrollments in hh2 with the accounting system.

**Navigation: HR>Enterprise>Benefit Enrollment.**

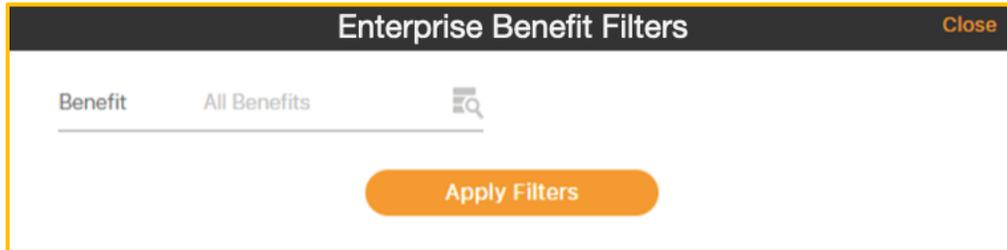


- Benefit Enrollment information may be searched by key word using the Search field.
- Benefit Enrollment information may be sorted Employee or Benefit.
- Benefit Enrollment may be filtered by Benefit.
- Benefit Enrollment may be added, deleted, and reconciled with enrollments in the accounting system.

**Note:** Expired benefit dates display in red.

**To Filter Employee Benefit Information:**

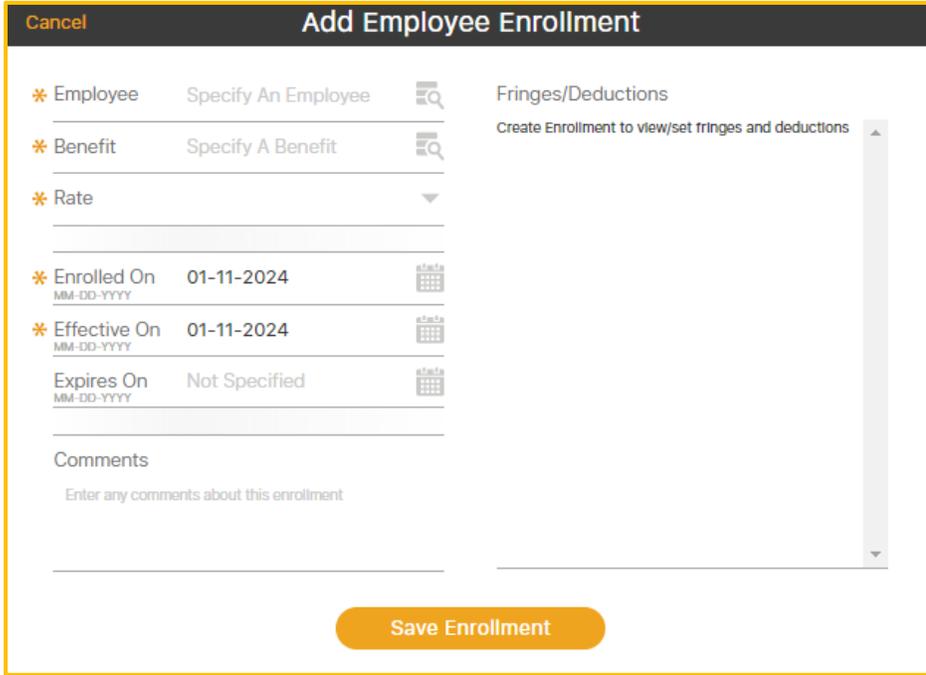
1. Navigate to HR>Enterprise>Benefit Enrollment.
2. Select the Filter  icon.



3. Select the Benefit by using the Magnifying  icon.
4. Select the Benefit.
5. Select Apply Filters.
6. Refresh.

## To Add a Benefit:

1. Navigate to HR>Enterprise>Benefit Enrollment.
2. Select the Add  icon.



**Cancel** **Add Employee Enrollment**

\* Employee Specify An Employee  Fringes/Deductions  
Create Enrollment to view/set fringes and deductions

\* Benefit Specify A Benefit 

\* Rate 

\* Enrolled On 01-11-2024   
MM-DD-YYYY

\* Effective On 01-11-2024   
MM-DD-YYYY

Expires On Not Specified   
MM-DD-YYYY

Comments  
Enter any comments about this enrollment

**Save Enrollment**

3. Select an Employee using the Magnifying  icon.
4. Select the Benefit using the Magnifying  icon.
5. Select the Rate from the Picklist.
6. Select the Enrolled On Date using the calendar.
7. Select an Effective On Date using the calendar.
8. Select an Expires On Date, if applicable, using the calendar.
9. Enter any comments.
10. Select Save Enrollment.

11. Once created, Fringes and Deductions can be viewed.

The screenshot shows a web form titled "Add Benefit Enrollment" with a "Close" button in the top right corner. The form is divided into two main sections. The left section contains fields for: Employee (#161) Bass; Jake, Benefit Dental Insurance, Rate Employee, Enrolled On 01-11-2024, Effective On 01-11-2024, and Expires On Not Specified. Below these is a "Comments" section with a text input field. The right section is titled "Fringes/Deductions" and displays a "Dental Insurance" entry with a "DE" icon, an amount of \$22.00, and an auto option set to "No".

Field	Value
Employee	(#161) Bass; Jake
Benefit	Dental Insurance
Rate	Employee
Enrolled On	01-11-2024
Effective On	01-11-2024
Expires On	Not Specified

Comments  
Enter any comments about this enrollment

Fringes/Deductions

Item	Amount	Auto
Dental Insurance	\$22.00	No

12. Select Close.

### To Edit a Benefit:

1. Navigate to HR>Enterprise>Benefit Enrollment.
2. Benefits may be searched for by using the Search field and entering the employee's name, benefit name, or benefit rate.
3. Select the benefit to edit.

**Edit Benefit Enrollment** Close

* Employee	(#133) Banks; Amanda S	🔍
* Benefit	401K	🔍
* Rate	401K Flat	▼
* Enrolled On	03-09-2021	📅
* Effective On	03-28-2021	📅
Expires On	Not Specified	📅

Comments  
Enter any comments about this enrollment

**Fringes/Deductions**

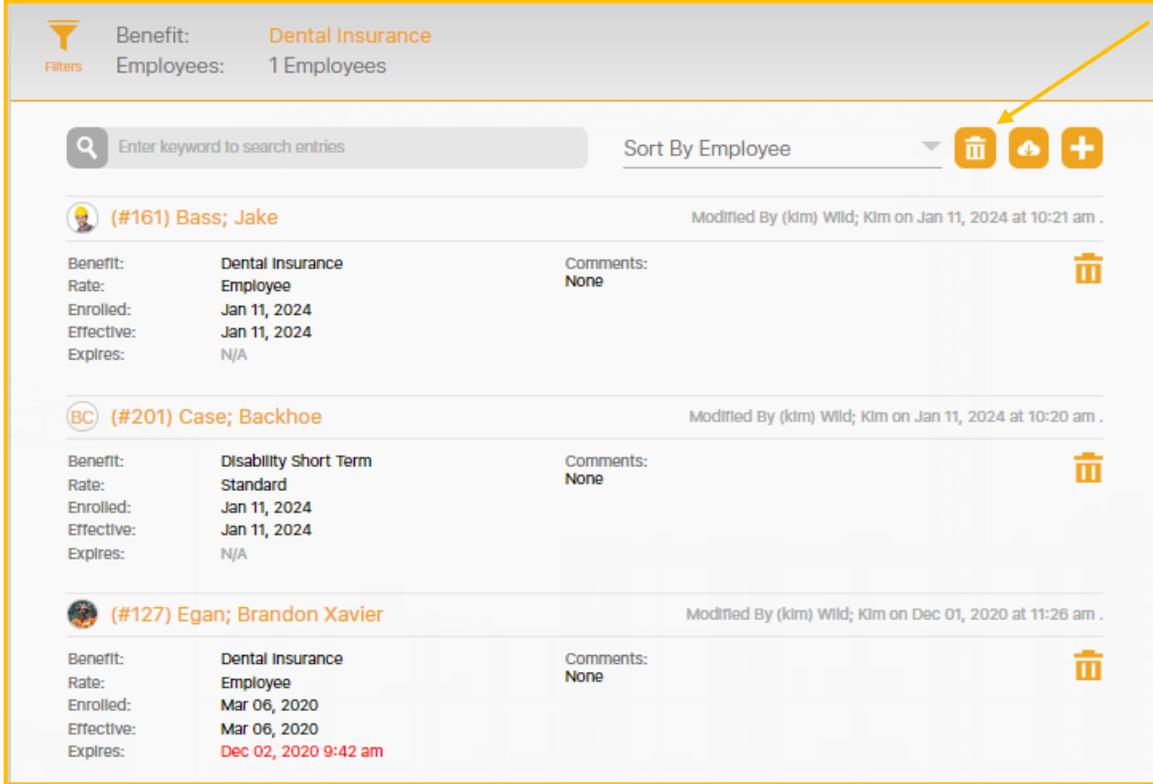
- 401K Match  
FR Auto: Yes
- Dependent Care Reimbusem  
DE Limit: \$16500.00 Auto: Yes

4. Make any modifications.
5. The Ajax check mark will indicate the change was accepted.
6. Select Close.

**Note:** Fringes and Deductions may be edited, as well. Select and modify.

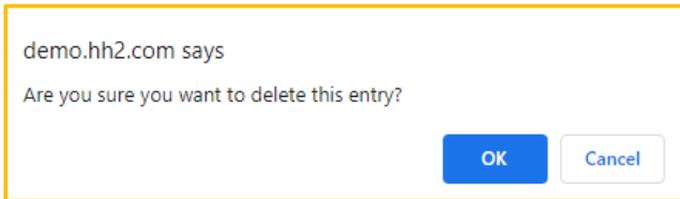
## To Delete a Benefit:

1. Navigate to HR>Enterprise>Benefit Enrollment.
2. Select the Delete  icon.



The screenshot shows a web interface for managing benefits. At the top, it displays 'Benefit: Dental Insurance' and 'Employees: 1 Employees'. Below this is a search bar and a 'Sort By Employee' dropdown. Three benefit entries are listed, each with a trash icon to its right. The entries are for Jake Bass (#161), Case Backhoe (#201), and Brandon Xavier Egan (#127). Each entry shows details like Benefit, Rate, Enrolled date, Effective date, and Expires date. Comments are listed as 'None' for all. The trash icon in the top right corner is highlighted with a yellow arrow.

3. Delete icons will now display next to all Benefits.
4. Select the Delete  icon next to the Benefit(s) to delete.

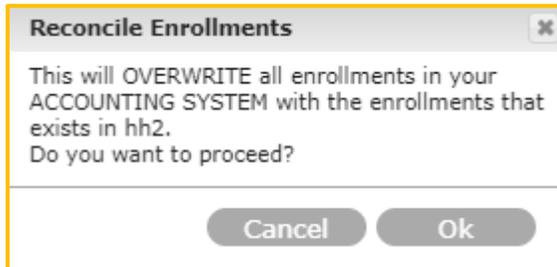


demo.hh2.com says  
Are you sure you want to delete this entry?

5. Confirm the deletion by selecting Ok.
6. Select the Delete  icon to exit the delete mode.
7. The Benefit(s) will be removed from the selected employees' records.

### To Reconcile Benefit Enrollment in hh2 with the Accounting System:

1. Navigate to HR>Enterprise>Benefit Enrollment.
2. Select the Download  icon.

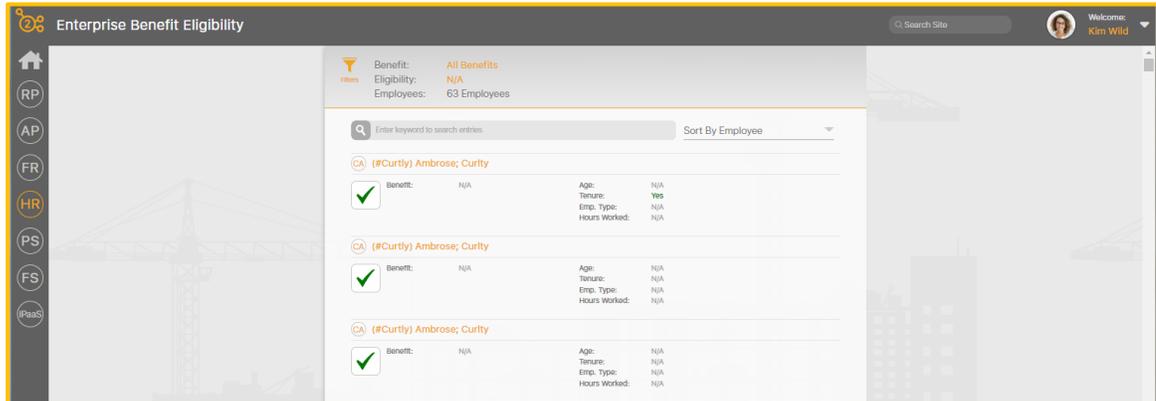


3. Select Ok. If in doubt, contact Customer Support for guidance.
4. After clicking Ok a sync will run between hh2 and the accounting system. This will take some time. If an employee has any benefit data in the accounting system that is different than what is entered in hh2, the accounting system data will be erased and replaced with the hh2 data.

## Enterprise Benefit Eligibility

This feature allows for Benefit Eligibility review.

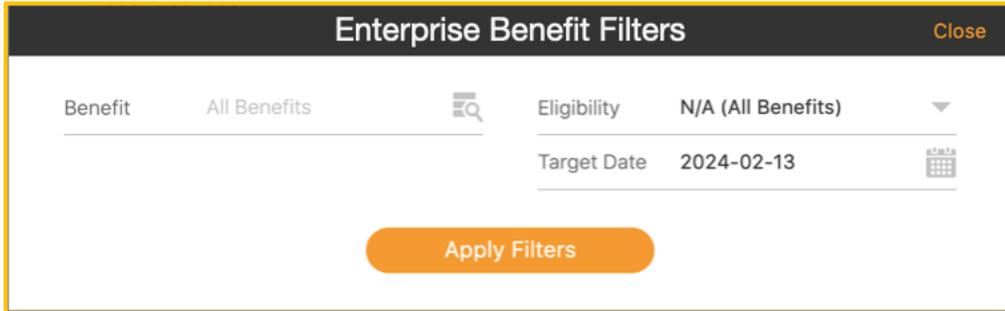
**Navigation: HR>Enterprise>Benefit Eligibility.**



- Benefit Eligibility information may be searched by key word using the Search field.
- Benefit Eligibility information may be sorted Employee or Benefit.
- Benefit Enrollment may be filtered by Benefit, Eligibility, or Target Date.
- Benefit Enrollment may be viewed.
- A green check mark indicates the employee is eligible for the benefit.
- A red check mark indicates the employee is not eligible for the benefit with details describing which fields the employee does not pass eligibility.

### To Filter Benefit Eligibility Information:

1. Navigate to HR>Enterprise>Benefit Eligibility.
2. Select the Filter  icon.



Enterprise Benefit Filters Close

Benefit All Benefits  Eligibility N/A (All Benefits) 

Target Date 2024-02-13 

Apply Filters

3. Select the Benefit by using the Magnifying  icon.
4. Select the Benefit.
5. Select Eligibility using the Picklist (Eligible Benefits, Projected Eligible Benefits, and Ineligible Benefits).
6. Select the Target Date.
7. Select Apply Filters.

## Mobile Apps

The hh2 HR mobile app can be downloaded for Apple iOS iPhone and iPad, as well as the Android Phone and tablet. Field users typically use the mobile application. See the HR User Guide for Field Users.

## Summary

The hh2 HR system is designed to house important employee information. This includes a vast variety of data including, but not limited to employee Classifications, Certifications, Evaluations, Raise Requests, Benefit information, Pay, EEO-1 stats and Disciplinary events.

After the system is set up, HR Managers and Administrators can store this vital information in the employee's record. Employees may access some of this data through the hh2 My Records Mobile Application. HR Managers/Administrators and those with permissions granted via Security Groups can access the information as well. HR Managers and Administrators may run required reporting on the data contained in the HR Module.

Please feel free to submit any comments, or issues regarding this documentation to [documentation@hh2.com](mailto:documentation@hh2.com)

## Glossary of Terms

**Note:** This includes terminology for all hh2 modules as well as some industry language.

**AB Locations:** This term is utilized in the hh2 HR module. AB (Address Book) Locations can be used to assign an employee to a particular location. For instance, a home office or state location.

**Acceptance Group:** In the document Acceptance step in the Document Flow (AP) module, multiple Acceptance Groups can be set up so that larger companies can divide new invoices into groups for more orderly processes. This is frequently done when the company has multiple physical office locations, multiple business entities, or multiple divisions within the company. Using Acceptance Groups, AP Clerks can process invoices for their own office, entity, or division and not get documents outside their jurisdiction.

**Accounting System:** For the purposes of this document, the accounting system is the construction company's Enterprise Resource Planning System. See [ERP](#).

**Accrual:** This term is used in the HR, Remote Payroll and Pay Stubs modules. It refers to the accumulation or gradual increase of benefits or earned time off over a specific period, typically based on the length of an employee's service or time worked.

**Admin or Administrator:** An employee at a construction company that has a high level of permissions within the hh2 system. This individual can create users and set permissions for users. Likewise, this individual can configure certain portions of the hh2 system. This person is different from both the hh2 Admin and the System Administrator. See [hh2 Admin](#).

**AP Clerk:** An AP Clerk is a user at the construction company that has permissions to perform some aspect of the invoice processing within hh2 Document Flow. Permissions can be set up to allow or deny AP Clerks access to portions of the software. This allows hh2 customers to configure AP Clerk permissions around their unique needs.

**AP Group:** This term is used in the Document Flow module. AP Groups are set up so that users can be given permissions based on the roles that they fill within the company. For example, an hh2 customer might set up a Field Supervision group and add all foremen and superintendents to it, so they only need to grant access to the accounting codes once.

**AP Manager:** This individual is someone at the construction company that has high levels of access and permissions within hh2 Document Flow. They oversee the processes of managing recipients, reimbursements, and invoices.

**AP Page:** This is the landing page of the hh2 system's Document Flow (AP Module). The AP Page is where the user can access features and functionality of the Document Flow Module. Each user's AP landing page will display based on the permissions granted to them. **Note:** The terms AP and Document Flow are used interchangeably within the hh2 system. See [Document Flow](#).

**Approval Path:** In the Remote Payroll module, the Approval Path is configured based on the construction company's needs and preferences, dictating the flow of time approval. The Approval Path can be established according to employee levels, group manager roles, or job manager roles. It is also structured in levels.

**Attendance Punch Clock:** In the Remote Payroll module, the Attendance Punch Clock captures time for Payroll Managers or Administrators to review. Coding is not captured with this feature. This should not be confused with the Punch Clock feature, which does capture coding.

**Bank:** The Financial Institution the construction company processes their credit card transactions through

**Batch:** Processing more than one piece of data at a time. This term typically refers to large numbers of invoices, receipts, or other financial instruments and time managed by hh2.

**Cardholder:** This term is used in the Document Flow (AP) module. This is the individual whom the credit card is assigned to in the Document Flow User Setup. This is also the person using the credit card for purchases, and who will upload the credit card receipts into hh2. **Note:** AP Administrators and AP Managers may also upload credit card receipts for the cardholder.

**Categories:** Some accounting systems have a customizable layer between Cost Codes and Cost Types. This enables a contractor to distinguish between multiple categories of the same Cost Type. For example, there might be two labor categories that accumulate to the Labor Cost Type, one for regular labor, one for overtime. A Contractor may budget for this ahead of time if they know the job will be on a tight deadline.

**Certified Work:** Work that the government guarantees an assured wage for certain types of work (by Certified Class) for government Jobs. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include [Davis Bacon](#) or [Prevailing Wage Work](#).

**Child:** In construction and business, structures often follow a hierarchical format, which means they are organized in a clear and structured manner with parent and child relationships. In the business realm, this can be observed in the presence of subsidiary companies operating under a larger parent company. Similarly, in data management, certain abstract concepts are categorized as child entities under a larger entity. For example, in construction projects, Extras or Sub Jobs can be considered as child entities of a more comprehensive Job. Furthermore, Cost Codes may serve as child entities tied to the specific Job. The term "Parent" is used to denote the larger, overarching entity in these hierarchical structures. Also see [Parent](#).

**Commitment:** In hh2, this term is often used interchangeably with "Purchase Order." It is an official document issued by a General Contractor to a Subcontractor or Supplier outlining the specifics of the commitment to perform labor or purchase materials. Commitment Items will include specifics like quantities, prices, and delivery terms.

**Cost Code:** Also referred to as "Phase Codes," Cost Codes are used as part of a Job Cost system to track the costs of a Job. In construction, many companies opt to use the standardized CSI Divisions as cost codes. For example, the CSI Division for Concrete is "03" and the Section for Decks is "500", so the cost code of "03-500" is for Concrete Decks. The fundamental purpose of cost codes is to track all job-related expenses in an orderly fashion that is consistent across all jobs, enabling complex cost management, reporting, and analysis.

**Cost Types:** Cost Types accumulate expenses under cost codes and categories using fixed types of costs. Common examples of Cost Types include Labor, Materials, Equipment, Overhead, Subcontract, and Misc/Other. Some construction [ERPs](#) allow partial customization of Cost Types instead of supporting Categories. When Categories are used for coding, there is no need to use Cost Types as all categories have a fixed Cost Type.

**Credit Card Transactions:** This term is used in the Document Flow (AP) module. It is a financial transaction in which a cardholder uses their credit card to make a purchase or payment, with the promise to repay the card issuer later. In hh2, the AP Administrator or AP Manager will upload these transactions from the bank into hh2 and the system will match them with receipts uploaded by the cardholder.

**Crew Punch:** In the Remote Payroll module, the Crew Punch feature allows a manager to punch all employees, designated to a certain Payroll Group, in or out at once.

**CVS (Comma-Separated Values) File:** A plain text file format used to store and exchange structured data, where each line represents a record, and fields within each record are separated by commas. This term is used in the Document Flow (AP) module.

**Daily Logs/Field Reports:** Within the Field Reports module, these terms are used interchangeably to reference construction logs that allow for reporting of a variety of variables on or off the job site.

**Data Entry:** This term is used in the Document Flow (AP) module. In hh2, Data Entry is the second step in the Document Flow-Invoice Process. It includes reviewing the Invoice, and coding data into the Header and entering full or partial Distributions. Typically, Data Entry is performed by AP staff before sending the invoice down the customizable Workflow. Much of the Header can be automated by using [OCR](#) and Autofill features of hh2 Document Flow. Often, the distribution coding during Data Entry is limited to just assigning a Job, and the detailed distribution coding is done during the workflow process by those assigned to manage the Job, such as a Superintendent or Foreman for smaller Jobs. The last step of Data Entry is choosing which workflow that should be used for approval or rejection if the default needs to be overridden.

**Davis Bacon:** Work where the government guarantees an assured wage for certain types of work (by Certified Class) on government. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include [Certified Work](#) or [Prevailing Wage Work](#).

**Decrement:** This term is used in the HR and Pay Stubs modules. It refers to the reduction or deduction of accumulated time off from an employee's leave balance.

**Distribution:** In the context of AP Invoices, Distribution refers to the allocation or assignment of costs to various Commitments, Jobs/Projects, Cost Codes, Categories or G.L. Accounts within a construction company. This process is essential for accurately tracking the financial performance of different Jobs/Projects and segments of the business. In hh2, Distributions are partially coded during the Data Entry step and final coding of Distributions can occur during the Workflow phase of the hh2 Document Flow-Invoice Process.

**Distribution Split:** This term is used in the Document Flow (AP) and Remote Payroll modules. When a single invoice must be coded to more than one Commitment, Job/Project, Cost Code, Category or GL Account (General Ledger), the user may elect to split the Distribution into multiple distributions. Users have the option to calculate the value of one of the Distributions to adjust to the remaining value after all other distributions are added up. Negative Distributions are permitted when necessary (although not common). This feature can also be utilized for Equipment in the Remote Payroll module.

**Document:** hh2 Document Flow is primarily a Document Management system. Documents refer to the financial instruments that hh2 Document Flow currently manages: Invoices, Reimbursements, Credit Card Transactions, and Application for Payments. Sometimes, the term Image is also used during the Data Acceptance step for images that need to be recognized by the Optical Character Recognition (OCR) before becoming a Document. The standard hh2 Document format is a Searchable PDF (either native pdf, or from raster images that have been run through the OCR process built into hh2 Document Flow Data Entry).

**Document Acceptance:** This is the process of accepting invoices that were captured using one of the many methods available to hh2 Document Flow Customers. Invoices can be captured by email, document scanner, monitored network folder, API, manual web upload, scanned by app, and uploaded after “opened in” an app. In cases where large groups of invoices were scanned in batch, typically by a document scanner, hh2 has advanced options to delete blank pages or split a document into multiple invoices and can be configured to combine multiple documents into a single invoice. Images may be enhanced and OCR’ed into Searchable PDF format.

**Document Class:** Utilized in the hh2 HR module. Document Classes provide a means to categorize available document types, appearing on Employee Records and Job/Crew Dashboards. For instance, documents may be related to 401K benefits, job offers or even company newsletters. This feature allows for a quick search on types of documents.

**Document Flow:** The hh2 module that streamlines the invoice management process. Also referred to as the AP Module.

**Document Flow Process for Invoices:** The four-step process of Document Acceptance, Data Entry, Workflow, Final Review and Export of invoices in the hh2 Document Flow (AP) system.

**Document Flow for Receipts:** The five-step process of Capturing and Uploading the Receipt Image, Receipt Coding, Importing Credit Card transactions, Workflow routing and the Final Review and Export to the accounting system. This process is performed in the Document Flow (AP) module.

**Document Flow Process for Reimbursements:** The four-step process of Capturing and Uploading receipts for reimbursement, Coding the reimbursement, sending it through a Workflow and conducting a Final Review and Export to the accounting system. This process is performed in the Document Flow (AP) module.

**EEO-1 Reporting:** Referred to in the hh2 HR module. The EEO-1 (Equal Employment Opportunity-1) report is a mandatory survey for U.S. employers with 100 or more employees, collecting data on workforce composition by race, ethnicity, gender, and job category. It helps identify and address workplace discrimination and promotes diversity and inclusion.

**Entity:** This term is used in the Document Flow (AP) module. It refers to the Business Unit used by the ERP accounting system. Sometimes the business entity is part of a larger parent company or entity. Sometimes business entities are created specifically for a large single project. Data Entities are abstract concepts that identify the properties that make it unique. Examples of data entities include Job, Employee, Cost Codes and GL Accounts.

**Equipment Revenue:** Within the Remote Payroll module, construction companies can monitor the duration of equipment usage. Employee time is linked to specific pieces of equipment for revenue tracking purposes. The Equipment Revenue undergoes an Approval Path and is ultimately exported to the accounting system.

**ERP:** Enterprise resource planning (ERP) is a type of software system that helps organizations automate and manage core business processes for optimal performance. In this case, the ERP system refers to the construction accounting system, such as Sage 300, Construction and Real Estate, Sage Intacct, Viewpoint Vista, and QuickBooks.

**Export:** Refers to the process of moving data from the hh2 system to the construction accounting system or ERP.

**Extra:** Sage 300 Construction, Real Estate, and Sage accounting systems (ERPs) opted to use a separate entity for a child job called an Extra. It denotes a smaller portion of a parent job that can be managed like a normal job. Most other construction accounting systems (ERPs) have opted to use hierarchal jobs (parent jobs and child jobs or sub jobs) instead of Extras. An example of an Extra might be an auditorium or exhibit hall as part of a larger complex.

**Field User:** A construction company employee that uses hh2 software out in the field.

**Field Work:** Work that happens in the field, versus in the Shop or Office.

**Finalize:** In the context of Field Reports, this refers to the process of locking down a log, so no further edits are allowed. Logs not finalized within the period specified in the System Setting (FR>Settings>System Settings>General Settings tab>Auto-finalize logs) will be automatically finalized by the hh2 system. This will protect the legal integrity and credibility of the Daily Log. However, there is the ability to add an addendum. Unit Production/Activities data is synchronized to the Sage 300 accounting system, as well as Remote Payroll data from the Remote Payroll module at the time of finalization.

**Final Review and Export:** During this step, invoices or are reviewed and then exported to the accounting system. Mistakes can either be corrected and invoices (for Document Flow) or time (for Remote Payroll) are sent back to earlier stages in the Workflow for revision. If everything checks out, the Invoice (for Document Flow) or Labor Time Sheet (for Remote Payroll) is approved and then exported to the accounting system (ERP).

**Foreman:** This role varies based on the construction company's business model and needs. Typically, this person is responsible for managing a crew of construction workers. For larger jobs, with multiple crews, a Foreman usually reports to a Superintendent. Within the hh2 system, this job role may be set up as a part of the Workflow process. Foremen usually approve standard invoices, receipts, or reimbursements and time in the Document Flow (AP) and Remote Payroll modules. Further, allowed Formen may have access to certain employee records in the HR module.

**Fringe:** The employer paid portion of the employee's benefits, such as health care costs. This term is used in the HR and Pay Stubs modules.

**General Ledger or G/L Account:** A comprehensive record of all financial transactions and accounts for an organization, providing a snapshot of its financial health. Sometimes referred to as the G.L. For construction accounting systems, the Job Cost is an abstraction of the G.L. that makes it easier to record transactions related to specific cost codes on specific jobs. Overhead expenses are commonly coded directly to a G.L. Account or to an overhead Job that rolls up to the G.L. Examples of overhead expenses may include rent, insurance, taxes, and salaries of office staff.

**Global Password:** A separate password in addition to the Administrator's own log in password. It is utilized when organizations have multiple Administrators, and only certain Administrators should have access to the Security Group Setup. [See Security Group](#). This provides a means to create security around Pay Stubs and employee records in the HR module.

**Header:** The portion of the invoice that uniquely identifies information for the entire invoice but is separate from the distribution (where costs are allocated to) data. Typical Header information includes, but is not limited to, items like Vendor, Invoice Date, and Due Dates. Data requirements for the Header are heavily based on individual construction accounting system requirements. This term is used in the Document Flow (AP) module.

**Hh2 Admin:** An hh2 employee that assists with set up of the construction company's hh2 site.

**HIPPA Regulations:** Referred to in the hh2 HR module. HIPAA (Health Insurance Portability and Accountability Act) regulations aim to protect employee privacy by establishing standards for the confidentiality and security of information, ensuring that sensitive details are safeguarded in the workplace. This term is used in the HR module.

**Home Page:** the initial landing page a user is brought into when signing into hh2.

**Icon:** a small graphical representation or symbol that represents an object, concept, action, or function. They are often designed to be easily recognizable and can represent anything from simple actions (like saving a file) to more complex concepts (like settings or navigation). For the purposes of this document, they may also be considered a button.

**Identifier or Site Identifier:** Refers to the company's unique hh2 URL site name. For example, if the construction company is ABC Construction, the identifier of "ABC," might be included in the URL. For example: "https://abc.hh2.com".

**Image:** This refers to any sort of raster image (like photos) or scanned invoices that have been uploaded to the hh2 system that have not yet been accepted into the AP-Document Flow module. Once these images have been run through the Document Acceptance process, they become Documents. Most of the time, these images become Invoice Documents, but can also become Credit Card Receipts or Reimbursements. Images may be uploaded in other hh2 modules such as Field Reports and HR.

**Import:** The process of moving data into the hh2 system from the construction accounting system or ERP. There are some places where data can be manually imported into hh2 like credit card transactions. Sometimes data can be imported by hh2 staff in excel format. For instance, a list of employees to set up as users.

**Invoice:** A bill a company receives from a vendor. Many vendors send invoices by email and are already in a native searchable pdf. For paper invoices that must be scanned, invoices may be received in an image format that must be run through hh2's OCR software in Data Entry before data can be automatically captured. This term is used to in the Document Flow (AP module).

**Invoice Acquisition:** Refers to how an invoice was acquired. Invoices can be acquired by email, document scanner, monitored network folder, API, manual web upload, scanned by app, and uploaded after "opened in" app. This term is used in the Document Flow (AP module).

**iPaaS (Integration Platform as a Service):** An hh2 product, depending on the software version, it may be seen as the OCM module on the Home Page. This links and syncs data between hh2 and certain 3<sup>rd</sup> party products such as Procore. hh2 Document Flow is bundled with hh2's Integration Platform as a Service or iPaaS. iPaaS is configured to automatically pull data from the construction accounting system (ERP) and reconcile it with the online copy within hh2. This ensures all accounting codes like Jobs, Costs codes, employees and others are always kept current within hh2. hh2's iPaaS also ensures that changes made in hh2 are synchronized automatically to the ERP. In some cases, hh2's iPaaS can also be configured to synchronize data from 3<sup>rd</sup> parties, such as Procore, directly to the ERP.

**Job:** A job is a contractual obligation to perform a specified scope of work for a customer. Also called a Project, a job can have multiple commitments (subcontracts and purchase orders) by vendors associated with it. hh2 Document Flow is set up to allow permissions to be configured by job and job role. Sometimes jobs can have child jobs or sub-jobs. In Sage 300 Construction and Real Estate, these sub-jobs are called Extras. In most other construction ERPs, they are simply child jobs of a larger parent jobs in a hierarchal relationship. Job and Project are used interchangeably by hh2. Time may be coded to Jobs in Remote Payroll.

**Job Code/Number:** A unique code assigned to a specific project or job within a construction company. This code is typically set up in sections to help make it easier to identify the job. It helps track and organize financial transactions, costs, and revenues associated with a particular project. Job Numbers are used to differentiate and manage various ongoing projects, allowing for accurate cost allocation, budgeting, and financial reporting. Job Codes can be alphanumeric and may include separator characters for each section. For example: "200-24" might be the 200<sup>th</sup> project the company has done, and it started in the year 2024.

**Job Phase:** Although some within the construction industry may refer to phases of construction, most of the time it refers to the work breakdown structure in Job Cost. Cost Codes and Phase Codes are used interchangeably. Some construction accounting systems use hierarchal cost codes or phase codes. Hh2 imports them as separate codes.

**Level:** In hh2, levels within the Workflow handle invoice review, approval, and passing from lower to higher levels, culminating in data export to the accounting system. Levels are more of a loose term as routing within a workflow can have decisions and branching logic that make levels more abstract.

**Module:** Refers to hh2's product offerings: AP-Document Flow for Invoices, Credit Cards, and Reimbursements; RP-Remote Payroll; HR-Human Resources; PS-Pay stubs; and FR-Field Reports.

**OCR:** Optical Character Recognition. It is a technology used to convert raster documents (any documents that use colored pixels to make a larger image), such as scanned paper documents, raster PDF files (pdf files that come from scanned images), or images taken by a digital camera, into hh2's native file format, searchable pdf. OCR technology enables computers to recognize and extract text from these raster images, turning them into machine-readable text that can be manipulated, searched, and analyzed. OCR is used to easily pre-fill header information on invoices.

**Overhead Expenses:** Expenses that are not coded directly to a job or project. These might include certain types of office workers or laborers assigned to maintain equipment, for instance. Many times, overhead expenses are coded directly to GL Accounts but sometimes companies choose to set up an overhead job to track overhead as it gives them advanced reporting available in the job cost system.

**Page:** The terms Page, Screen, Form or Window are used interchangeably in this document. All referring to the location of the visual display of information.

**Parent:** Some concepts in construction are hierarchal, meaning they are organized and structured with parents and children. For business entities, sometimes child companies are part of a larger parent company. For data entities, some abstract concepts fall as child entities of another larger entity, such as Extras or Sub jobs being a child of a larger Job, or Cost Codes being a child entity to the Job that tracks costs. See: [Child](#).

**Pay-app:** Refers to a payment application or payment request. It is a formal document submitted by a contractor or subcontractor to request payment for work completed on a construction project. The pay app outlines the amount of work done, materials used or stored to date, and any other billable items, along with their associated costs. In hh2 this is currently in Beta.

**Pay Identifier:** This is the identifier for a type of pay within the accounting system.

**Payroll Group:** In the Remote Payroll module, a Payroll Group refers to a collection of employees who share similar payroll characteristics. For example, all salaried employees may be assigned to one Payroll Group, while another Payroll Group may include all hourly employees.

**Pay Type:** This is how hh2 distinguishes types of pay. For example, Regular Pay, Overtime Pay, Paid Time Off, Sick Pay and others. Pay Types can be set to display, or not, on hh2 Pay Stubs. This term is used in the Remote Payroll, HR, and Pay Stubs modules.

**Picklist:** Also known as a dropdown list, is a menu-like interface element often seen in forms and websites, offering users a set of predetermined choices to choose from, enhancing data entry efficiency and uniformity. In hh2, Picklists come in the form of Cards or dropdown lists.

**Prevailing Wage Work:** The government guarantees an assured wage for certain types of work (by certified class) on government Jobs. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include Certified Work or Davis Bacon.

**Project:** A project is a contractual obligation to perform a specified scope of work for a customer. More commonly called a Job within hh2, a project can have multiple commitments (subcontracts and purchase orders) by vendors associated with it. hh2 Document Flow is set up to allow permissions to be configured by job and job role. In the Remote Payroll module, Payroll Groups may be assigned to Jobs. Sometimes jobs can have child jobs or sub-jobs. In Sage 300 Construction and Real Estate, these sub-jobs are called Extras. In most other construction ERPs, they are simply child jobs of a larger parent jobs in a hierarchal relationship.

**Promote:** In the context of Workflows, "Promote" refers to the capability to advance an approval from one level in the approval process to the next without requiring approval from the current level. This functionality is utilized when an approver is unavailable to approve time or receipts. Additionally, "Promote" signifies that the time or document is currently at a lower level than the logged-in user. This term is used in the Document Flow (AP) and Remote Payroll modules.

**Punch Clock:** In the Remote Payroll module, the Punch Clock feature enables employees to log their time by punching in and out, including coding. It is important to note that this feature should not be confused with the legacy Attendance Punch feature, which does not capture coding. Similar to labor and equipment, Punch Clock time follows an Approval Path and is eventually exported to the accounting system.

**Push Notification:** A push notification is a short message or alert sent to a user's device. These notifications "push" information to the user without requiring them to actively open them. They appear on the device's screen, usually accompanied by a sound.

**Queue Digest:** A queue digest, often referred to as a "queue summary" or "queue report," is a consolidated overview of activities or items in a queue. It provides a snapshot of the status, progress, and contents of the queue at a specific point in time. This summary can include information such as the number of items waiting, being processed, or completed, as well as any relevant details about those items. Queue digests are often used to help users or administrators quickly understand the state of a queue without having to review each item individually. Specific to hh2's Document Flow, a Queue is a summary of all invoices in the workflow requiring action from the user.

**Receipts:** Receipts are written or electronic documents that serve as proof of purchase. Purchases are typically made on the construction company's credit card, then uploaded into the hh2 system by snapping a picture. The AP Manager or Administrator then imports credit card transactions from the construction company's bank. Once this process occurs, the receipt is now converted to and considered an invoice in hh2. This term is used in the Document Flow (AP) module.

**Reclaim:** In the context of Workflow or Approval Path, "Reclaim" denotes the action of retrieving time or documents back to one's own level for approval. This feature allows users to bring items back to their stage in the approval process for further review or necessary adjustments. It also serves as an indicator to the individual in the highest level of the Workflow or Approval Path that either documents or time is ready for export. This term is used in the Document Flow (AP) and Remote Payroll modules.

**Reimbursements:** Unlike receipts, reimbursements are purchases made directly by the employee, either by cash or on their personal credit card. Receipts, on the other hand, are purchases made on a company credit card. Once uploaded and coded, reimbursements move through the Workflow as an invoice. Finally, they are exported to the accounting system. This term is used in the Document Flow (AP) module.

**Roadblock:** In the context of the time approval process, a "Roadblock" refers to an obstruction disrupting the normal flow of the approval process. Payroll Managers and Administrators can leverage the Roadblock feature to identify the specific level within the Approval Path where the obstruction is occurring. This feature aids in pinpointing issues and streamlining the resolution process.

**Section/Tab:** These terms are often used interchangeably. This is the portion of the Daily Log/Field Report that contains specific data related to the Section. For instance, the Weather Section (tab) stores information about the current logs weather conditions. This term is used in the Field Reports module.

**Security Group:** **Security Groups:** Utilized to in the hh2 HR and Pay Stub modules. Security Groups are utilized to categorize users, including HR Managers and other authorized individuals, into specific groups, dictating their access to employee records and pay stub information. The configuration of Security Groups is restricted to System Administrators.

**Shop:** An in-house workshop where employees of a construction company perform work such as welding for Jobs. This may also include fixing and maintaining company equipment. This is the opposite of Field Work, where work occurs on the job site.

**Skills Matrix:** In the HR module, the Skills Matrix allows the HR Administrator the ability to set up skills matrices that tie into the Evaluations tab on the Employee Record, Jobsite Dashboard, and the Crew Dashboard. Furthermore, Skills appear on Classifications and Locations reporting.

**Synchronization (Sync):** The process of syncing data between hh2 and the construction accounting system or ERP. This can be either importing or exporting data to and from hh2.

**Standalone:** If a construction company uses hh2 without an ERP, then they do not synchronize data to and from an ERP accounting system using hh2's built-in iPaaS. Some features and functionality will behave differently without this automated integration. Setup for the system will differ as well. Generally, this is not considered a best practice if the integration for the ERP in context already exists. However, construction companies that use non-construction accounting systems or rarely used construction ERPs may choose to use hh2 standalone.

**Superintendent:** Oversees the entire project in the field. These individuals typically report to a Project Manager and holds teams and foremen accountable for completion of work. In some smaller construction companies, the Superintendent acts as the Foreman and Project Manager.

**System Administrator (Also referred to as Global Administrator):** This is typically the IT person at the construction company. The System Administrator's role is to roll out the hh2 product at the construction company. They usually work with synchronization tools to ensure data is properly synchronized between hh2 and the company's accounting system and may be involved with the initial setup of user accounts and permissions.

**Unit:** A standardized quantity or measure used to quantify and price specific tasks, materials, or services within a project.

**Unit Cost:** The unit cost represents the expense of obtaining or creating a single unit of an item, including materials, labor, equipment, and overhead. This cost estimation method aids in calculating the total cost for a project component by multiplying the unit cost by the required quantity. For example, when building a concrete foundation, there may be a unit of "cubic yards of concrete." The unit cost would include the cost of materials (cement, aggregates), labor, equipment, and other expenses required to produce one cubic yard of a concrete foundation.

**Unit Production:** This term is referenced in the Field Reports module. In construction, Unit production involves quantifying work tasks using standardized units, such as square footage or linear feet. An example of unit production is tracking the square footage of drywall installation. This method allows for precise measurement, tracking, and management of construction activities. By breaking down tasks into measurable units, construction professionals can more accurately estimate costs, assess project progress, and allocate resources efficiently.

**User:** Anyone that logs into hh2. They must have a user account, with a username, password, first and last name and email address and ideally a cell phone number.

**Username and Password:** Within hh2 software, a user's username and password are considered global, and can be used across all the hh2 modules that have been purchased.

**User Preferences:** Customizable settings that allow individual users to tailor the software's functionality, appearance, and behavior to their specific needs.

**User Roles:** User Roles define specific permissions, access levels, and responsibilities assigned to different individuals within a system, ensuring proper data security and functionality based on their roles and responsibilities. In hh2 Document Flow, for example key roles include the 1) System Administrator 2) Administrator 3) AP Manager 4) AP Clerk 5) Office User and 6) Field User. The key differentiator between the Administrator and Manager is that the Administrator can create new users and grant permissions to users.

**Vendor:** For Invoices in hh2 Document Flow, a vendor refers to an Account Payable (AP) Vendor, which is a supplier for Purchase Orders or a Subcontractor for a Subcontract. All Commitments have an AP Vendor assigned to it. For Credit Card transactions, a Vendor refers to the business that the item was purchased from in the credit card transaction. For reimbursements, some companies choose to set employees up as Vendors so that approved reimbursements can be processed via AP check.

**Workflow:** A system designed to facilitate the routing and approval of time, invoices, and other documents down a predefined path with branching logic. Hh2's workflows are designed with Role Based Approval so that very few workflows need to be configured. Decision nodes in the workflow determine how time, invoices and other documents will be routed in the workflow. For example, invoices can be routed in one direction if certain criteria are met, or the opposite direction if it is not. For instance, one possible configuration is to route the invoice in one direction if it is coded to an overhead GL Account or another direction if the invoice was coded to a job. Another possible configuration is to route the invoice in one direction if the invoice is over a certain dollar amount or another direction if it is less. Labor time, on the other hand, may be routed to various levels of job roles for approval and rejection through an Approval Path. This term is used in the Document Flow (AP) and Remote Payroll modules.

## Change Log

A Change log is a documented list of changes between one version of a document and the next version.

This is Version 1, therefore there are no changes.