

# Top-11 Tasks Quick Steps Guide for Advanced HR 2.0

This AHR 2.0 Top-11 Quick Steps guide describes how to do the following tasks:

- Search Company / Employee
- Add a User
- Change a Pay Rate
- Approve a Direct Deposit
- Reset a Password
- Terminate an Employee
- Add a New Hire Manually
- Running Self-Service
- Run a Report
- Create an Announcement
- Rehire an Employee

## 1. Search Company / Employee

### Company Search

1. Enter a name in the **Company Search** field at the top of any screen. Enter at least two letters.
2. The system displays any matching companies. You can also enter ?? in the **Company Search** field to display a complete list of companies.
3. Select the **Company** you want from the dropdown.

### Employee Search

1. Enter an employee first name, last name, or employee number in the **Employee Search** field at the top of any screen. Enter at least two characters.
2. The system displays any matching employees. You can also enter ?? in the **Employee Search** field to display a complete list of employees.
3. Select the Employee you want from the dropdown.

### Locking Down a Company / Employee

Once you select a company and/or employee, Advanced HR will “lock” the selections (company / employee) until you change them. This lets you easily display other screens for that same employee.

### Unlocking a Company / Employee

You can “unlock” a company or an employee by clicking the “X” on the right side of the **Company/Employee Search** field.

## 2. Add a New Hire Manually

Administrators can add a new hire manually by following these steps. This is a two-step process: Create a new hire (make them an **employee** of a company), and add them as a **user** to the system. Both steps can be done together or separately:

1. Navigate to **HR Admin – Employee Actions – Add New Hire**.
2. The system displays **Step 1 – Type of Hire** section of the Add New Hire wizard.
3. Select the **Company** if not already selected.
4. Optionally, enter a **Tax Form**.
5. The system defaults the **Hire Date** to today; you can change it.
6. Select a **Position**. You can add one ‘on the fly’ by clicking the blue + plus icon.
7. The system will assign the next available **Employee ID**.
8. Click the **Let’s Begin New Hire** button.
9. The system displays **Step 2** of the Add New Hire wizard. Complete the New Hire’s information in each section:
  - **Profile** information (name, address, SSN)
  - **Classification** (gender, ethnicity, education)
  - **Compensation** (pay type, frequency, rate)
  - **Payroll and Benefits** information
  - **Taxes** (Federal and State Tax)
  - **Employment** info (position, status, reports to)
  - **Emergency Contact** info
  - **User section (Quick Add User)**: You can use this section to quickly add a user and assign them a role for access to the system, or you can add them as a user as a separate action later (see following task #3).
10. When all the new hire info is complete, click the **Submit New Hire** button.
11. The system takes you to the **Employee Summary** dashboard. The new hire is an employee and ready to go. If you used the **Quick Add User** button, you may want to go to the **HR Admin - Company – User** screen later to add any additional information about the user.

## 3. Add a User to Advanced HR 2.0

An already existing **employee** can be quickly added as a **user** to the system with the **Quick Add User** feature:

1. Navigate to **HR – Admin – Employee Maintenance – Employee Summary**.
2. On the **Employee Summary** dashboard, click on the employee’s name.
3. Scroll down to the **User** section.
4. Click the **Quick Add User** button.

5. On the **Quick Add User** screen, you can create a username, edit contact info, set a time zone, assign a role, and optionally, send the employee a welcome email.
6. Click the blue **Add User** button.
7. You return to the **Employee Summary** screen. Click the green **Link User** button to link all of the following:
  - The **user**
  - The **employee**
  - The **company**

The **Quick User Add** option is a fast method to add a user to the system with the most important fields. If other details about the user are to be entered, go to the **HR Admin - Company - User List** screen after completion to review or add other details.

## 4. Running a Self-Service Setup

Self-Service Setup allows for **multiple employees** to be given access to **Employee Self-Service** at the same time. This will create users for all selected employees and attach each user to the Employee Record.

1. Navigate to **HR Admin – Employee Actions – Self Service Setup**.
2. The system displays the **Self-Service Setup** dashboard. The default list of employees includes all currently Active employees who do not have Self-Service setup for them.
3. Use the **Send Welcome Email** Yes/No toggle to indicate if you want to send an email to each employee with instructions how to login and enter their information.
4. Select a **Company**.
5. Select the **Company's Timezone**.
6. Select a role in the **Assign a Role** dropdown and that role will be assigned to all employees in this self-service setup. Best practice is to initially assign the **Base User** role to everyone. After the employees complete self-service, the Admin can assign any additional roles needed for each person.
7. Designate the **Employees to be Setup with Self-Service**, you can edit the list, adding or excluding employees.
8. Once complete, click the **Setup Self-Service** button.

The Welcome Email – if set to **Yes** - is sent to all the employees that were designated for Self-Service Setup, which provides them with instructions about how to sign in and access their Advanced HR 2.0 Employee Self Service Portal (**My HR**). Note the email link is only good for 24-hours.

## 5. Change a Pay Rate

To change an employee's pay rate:

1. Navigate to **HR Admin – Employee Maintenance – Compensation**.
2. In the **Employee** section, select the **Company** and **Employee** (if not already locked in).
3. In the **Compensation Info** section, change the employee's Pay Rate by entering the new rate in the **Rate** field.
4. In the **Other Info** section, optionally select a reason for the pay rate change in the **Change Reason** field.
5. Optionally, enter any applicable **Comments**.
6. Click **Save Changes**.

## 6. Run a Standard Report

Base Manager user roles or higher can view and run the available Standard Reports.

1. Navigate to **HR Admin – Reporting – Standard Reports**.
2. The system displays the **Standard Report List**.
3. Find the row for the report you want to run.
4. Click the green **Execute Report** button (right arrow).
5. The system displays the **Set Report Properties** screen.
6. Select the **Company**. You can select only one company.
7. Set the **Report Properties** fields which may vary depending on the type of report you want to run.
8. Click **Execute Report**. The report opens in a pop-up browser window. You can save the report by downloading it to your device in a variety of file formats.

**Note:** Make sure your Browser settings are configured to allow pop-ups, otherwise the report will not run.

## 7. Approve a Direct Deposit

Base Admins/Base Managers can approve or reject an employee's direct deposit request:

1. The user receives an email notification of an employee's direct deposit request submission; click on the link.
2. The system displays the **Direct Deposits** dashboard. **Base Admins** see all direct deposit requests for the entire company. **Base Managers** see only those from employees they supervise.
3. On the Dashboard, click on the name of the employee that displays **Pending** in the **Status** column.
4. On the **Details** screen, edit any information about the direct deposit request, if needed.
5. In the **Deduction Info** section, select the **Deduction Codes**. These are the E/D Codes from Evolution Classic.

- Change the **Approval Status** from **Pending** to **Approved** (or to **Rejected** to reject the request).
- Click **Save Changes**.

## 8. Create an Announcement

Company announcements appear on the **Announcements** section of the Company **Dashboard** for all employees.

- Navigate to **HR Admin – Company - Announcements**.
- The system displays the **Announcements** dashboard showing any existing announcements.
- Click the green **+ New** button.
- Select the **Company**, if not already locked in.
- Enter a **Title** for the announcement.
- Enter the text (wording) of the announcement in the **Detail** section. Use the ribbon buttons to format the text.
- In the **Status** section, use the Yes/No toggles to set the **Announcement On** and whether it is **High Priority** (displays at the top of the list).
- In the **Dates** section, you can set the date the announcement should first appear in the **Post Date** field.
- Select the date from the **Expiration Date** calendar that the announcement should no longer display.
- Drag and Drop or browse to any Images for the announcement (These can be JPG, PNG, GIF).
- Click **Save Changes**.

## 9. Reset a User's Password

- Navigate to **HR Admin – Company – User List**.
- In the **Actions** column of the **User List** screen, click on the arrow button (hover text = **Reset Password**).
- The system prompts “**Reset User Password?**” Click **Yes**.

## 10. Rehire an Employee

- Navigate to **HR Admin – Employee Maintenance – Employment Detail**.
- Select the **Company**.
- Select the **Employee**.
- The **Effective Date** defaults to today. Change, if applicable.
- Set the **Is this a Re-Hire?** toggle switch to **Yes**.
- Click **Let's begin adding a Position/Organization**.
- The system displays the employee's **Employment Detail** screen.
- Scroll down to the **Position/Status** section.
- Click **Save Changes**.

The employee is now **Active**.

## 11. Terminate an Employee

Super Admins, SB Admins, and Base Admins only can terminate a current Active employee:

- Navigate to **HR Admin – Employee Actions – Terminate Employee**.
- The system displays the **Termination Process Wizard – Step 1 – Employee Info** section.
- Select the **Company**.
- Select the **Employee**.
- Select the **Termination Date**. Defaults to the current date. It can be back dated but not postdated.
- Click the **Let's Begin Termination** button. The system displays **Step 2 – Fill out Termination Information** section.
- Select the **Status** (Terminated, Suspended, etc.).  
You can add a new **Status** or **Termination Reason** 'on the fly' by clicking the blue Plus sign (+) icon.
- Optionally, select the **Termination Reason** (Due to Layoff, Transfer, etc.).
- Indicate if the person is **Eligible for Rehire** with the Yes/No toggles.
- Enter an optional **Comment** about the termination.
- Click **Submit Termination**.

**Note:** After Terminating the employee, remember to adjust their User Security Role accordingly. Go to **HR Admin – Company - User List**. Click on the user. If, for example, they were a Base Manager, that level should be removed so they only have access as a Base User. If you choose, you can also delete or make them inactive as a user.



### For More Information:

Go to the **Evolution Resource Center** at:  
<https://support.evolutionhcm.com> to view the latest Advanced HR 2.0:

- Training Guides
- User Manuals
- Instructional Videos
- Implementation Center materials