

| Queries an Admin can ask and the answer a bot should give to those queries | | |
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| | How do I add a new employee to my team | <p>As an Admin to add a new employee you should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click</p> |

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| | | <p>'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> <p>Note: Must create the file in the accepted format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees</p> |
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| Question ID | Question Variations | Bot Answer |
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| | Where can I go to register a new staff member? | <p>As an Admin to register a new staff member you can go to your Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your</p> |

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| | <p>How do I create an employee profile in the system?</p> | <p>As an Admin to create an employee profile in the system you should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | <p>How do I officially add someone to my team in Humanity?</p> | <p>As an Admin to officially add someone to your team in Humanity you should login in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee, you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | <p>What steps do I follow to bring a new employee into the system?</p> | <p>An Admin, to bring a new employee into the system, should follow following steps: Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | <p>How can I give system access to a new hire?</p> | <p>An Admin, to give system access to a new hire, should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | <p>What's the correct way to add an employee under my management?</p> | <p>For an Admin the correct way to add an employee under his management, The Admin should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee, you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your</p> |
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| | <p>Where do I input new team members in the platform?</p> | <p>An Admin, to input new team members in the platform, should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee, you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | <p>How do I set up a new employee's account?</p> | <p>An Admin, to setup a new employee's account, should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | | <p>Note: Must create the file in the accepted format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees.</p> |
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| | <p>Is there a specific form or section to add a new hire?</p> | <p>Yes, there is a specific form or section to add a new hire. Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | | <p>Note: Must create the file in the accepted format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees.</p> |
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| | <p>How do I grant system access to my new employee?</p> | <p>An Admin, to grant system access to his new employee, should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | | <p>Note: Must create the file in the accepted format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees.</p> |
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| | <p>How do I assign a new employee to my department?</p> | <p>An Admin, to assign a new employee to his department should, Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | | <p>Note: Must create the file in the accepted format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees.</p> |
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| | <p>What's the step-by-step process for adding a new team member?</p> | <p>For an Admin to add a new team member the step by step process is : Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | | <p>Note: Must create the file in the accepted format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees.</p> |
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| | <p>How do I verify that my new employee is added correctly?</p> | <p>To verify that new employee is added correctly an Admin should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | | <p>Note: Must create the file in the accepted format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees.</p> |
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| | <p>How can I add a new user?</p> | <p>For an Admin to add a new user, he should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> |
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| | | <p>Note: Must create the file in the accepted format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees.</p> |
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| Q001 | How can I add a staff ? | <p>For an Admin to add a staff, he should Log in via Computer Browser and Navigate to the "Staff" tab and click on the "Add Employee" Enter the essentials details for the user you want to create. (To create the employee you must provide a first name, the last name and the email address can also be added later on.</p> <p>Add Employees Manually:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen.</p> <p>Step 3: Add details in the boxes (First name, Last Name & Email address).</p> <p>Step 4: Click 'Save Employees'</p> <p>Add Employees Using Detailed Form:</p> <p>Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees' button at the top right corner of the screen</p> <p>Step 3: Click 'Detailed Form' tab if you want to add detailed information for your staff while adding them from the bottom of the page.</p> <p>Note: There are two types of mode (simple or detailed), you can add details as per your requirements and the option is at the right side.</p> <p>Step 4: Scroll down to check 'Send Activation'.</p> <p>Notes: If this box is checked and an account is set up with an e-mail address a welcome e-mail will be sent to this employee with their login instructions. If this box is left unchecked, they will be silently added to the system and can be sent their activation email or given their login details at any time later.</p> <p>Step 5: Either click 'Create Employee' or 'Create Employee & Add Another'</p> <p>Import Employees via .csv File: Step 1: Click 'Staff' module from the top-panel.</p> <p>Step 2: Click 'Add Employees Step 3: Click 'Import .csv or .xlsx' if you want to import your staff information in bulk</p> <p>Note: Must create the file in the accepted</p> |
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| | | <p>format given.</p> <p>Step 4: Click 'Choose File' tab to select the file you want to use to import employees.</p> <p>Step 5: Click 'Import File' tab to import your staff details</p> <p>Note: You can also add custom fields via .csv or .xlsx import. Just match your column title with a "Custom Field". If a custom field does not exist, a new custom field will be created, and its value will be added to an employee's account. The number of custom fields is not limited.</p> <p>Activate Employee profile:</p> <p>Once you have created the employee profile the next step is to activate the profile. In the "Staff" tab click on "Not Activated" to view the employee profile which needs to be activated. Click on the "Send Activation E-mail Now". If the email address is added into the profile the employee will get a welcome email and the instruction to activate the profile. You can manually activate the employees' profile by clicking on the "Manually Activate All" button. If you are manually activating the staff make sure to create a password and a username for the staff members. Also you can Send an Activation Email via Staff Profile. Click on the name of the 'Staff' to go to the profile of an individual you want to send an activation email. Click 'Send Activation E-mail Now' or 'Manually Activate' under the Admin Action section of the profile.</p> <p>Important: If you do not see the option to "Add Employee" that means you do not have the necessary permission level to add an employee.</p> <p>P.S: To add employee YOU must have a manager/admin, supervisors and schedulers access privileges in Humanity to add employees.</p> |
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