Business Solution ELO HR Personnel File

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1.04

Table of contents

Introduction

Structure of the documentation

The goal of this documentation is to explain all functions of Business Solution ELO HR Personnel File.

Basics

The Basics chapter explains the ELO HR Personnel File program interface.

Possible actions

The remaining chapters address possible actions using the ELO HR Personnel File.

Target audience

This documentation is addressed to Business Solution ELO HR Personnel File users. Separate documentation is available for administrators on the ELO SupportWeb.

The scope of functions presented in this documentation may differ greatly from those in your client.

If you do not find functions described in this documentation in your client, you do not have permission to perform the action.

The majority of functions can only be performed by employees of the HR department. The functions described in the Self-service chapter are available to employees of other departments.

Basics

Basic principle

ELO HR Personnel File enables you to create electronic personnel files and standardizes documents, regardless of formats.

It maps the onboarding and offboarding processes within your company. A personnel file where you can store all documents in digital form can be created for each employee. ELO HR Personnel File also assists you in creating employee badges and documents.

The dashboard helps you keep an overview of the employees in your company as well as of important dates, such as the end of the probationary period.

Organizational charts enable you to map your company structure.

General note

ELO HR Personnel File works with the following clients:

- ELO Web Client
- ELO Java Client
- ELO Desktop Client

> **Information**
>
> In this documentation, we use screenshots from the ELO Web Client.

Refer to the specific ELO client documentation for more details on how they work in general.

Requirements

Your administrator must have configured ELO HR Personnel File for you.

Program interface

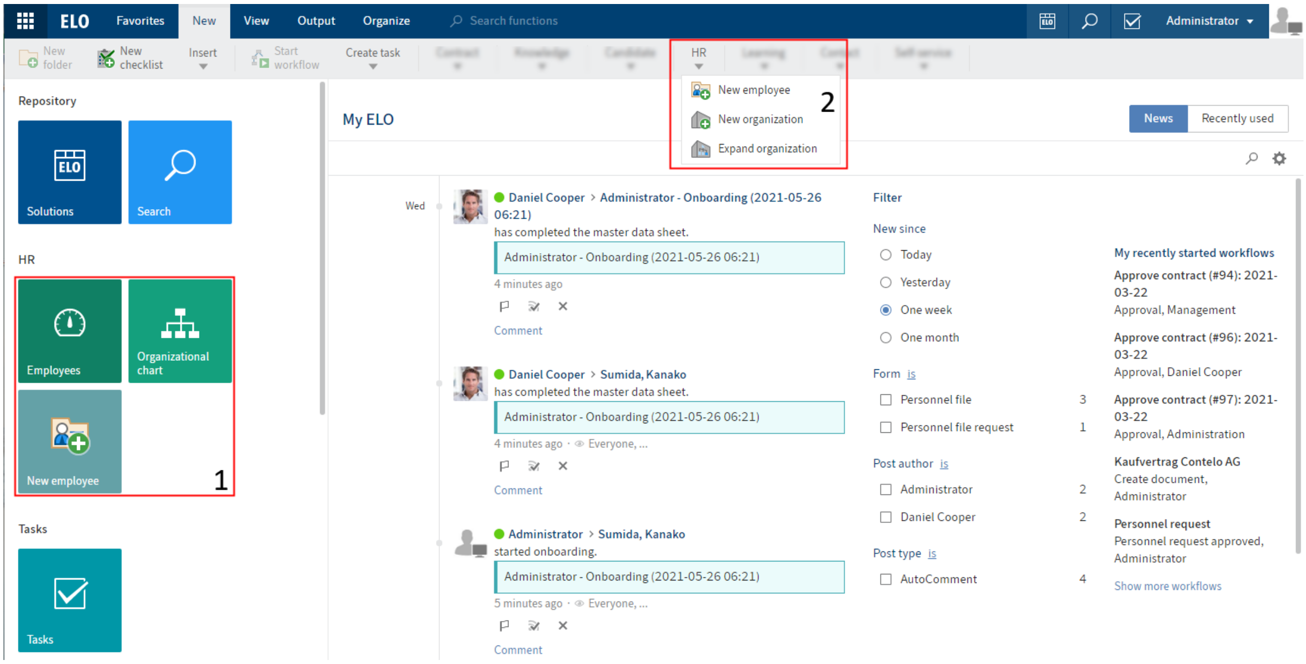

Fig.: Business Solution ELO HR Personnel File program interface

You will find ELO HR Personnel File functions in the following areas:

1 Employees, Organizational chart, and New employee tiles in the tile navigation

The screenshot shows all ELO HR Personnel File tiles in a group. However, this view can vary depending on your individual configuration.

2 *HR* group on the *New* tab

Use the functions of this group to create new personnel files and organizations.

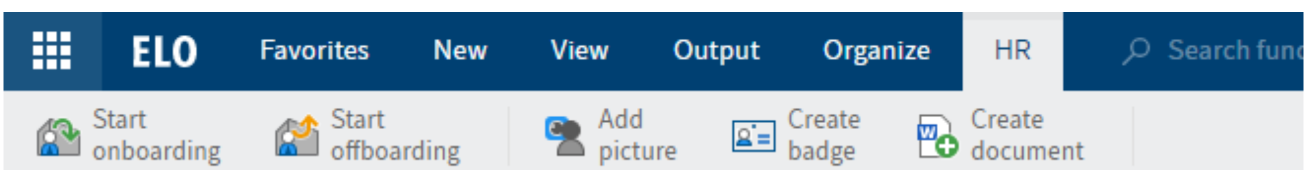

Fig.: 'HR' tab

3 'HR' tab

As soon as you select a personnel file, the *HR* tab appears.

This tab is where you can start onboarding and offboarding processes and create documents for employees.

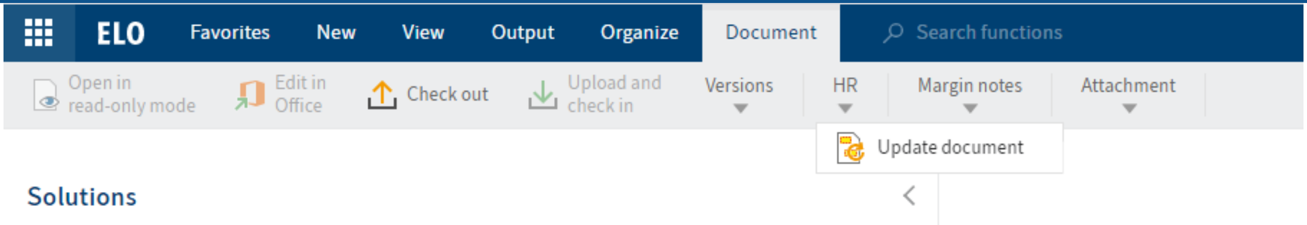

Fig.: 'Update document' function

4 Update document function on the *Document* tab in the *HR* group

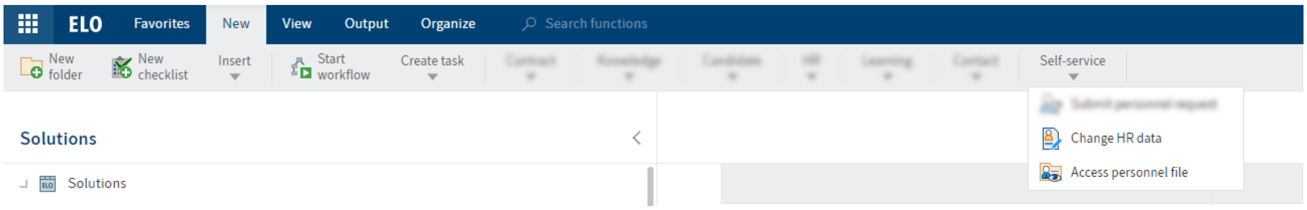

Fig.: 'Self-service' tab

5 Change HR data and *Access personnel file* functions in the *Self-service* group on the *New* tab.

These functions allow employees to make changes to their own personnel file or to submit a request to view their own personnel files. Supervisors can also request to view the personnel files of their employees.

Repository

The structure and appearance of the repository depend greatly on your specific configuration. The default state is described here.

Personnel files are filed to *// Human resources // Personnel files*.

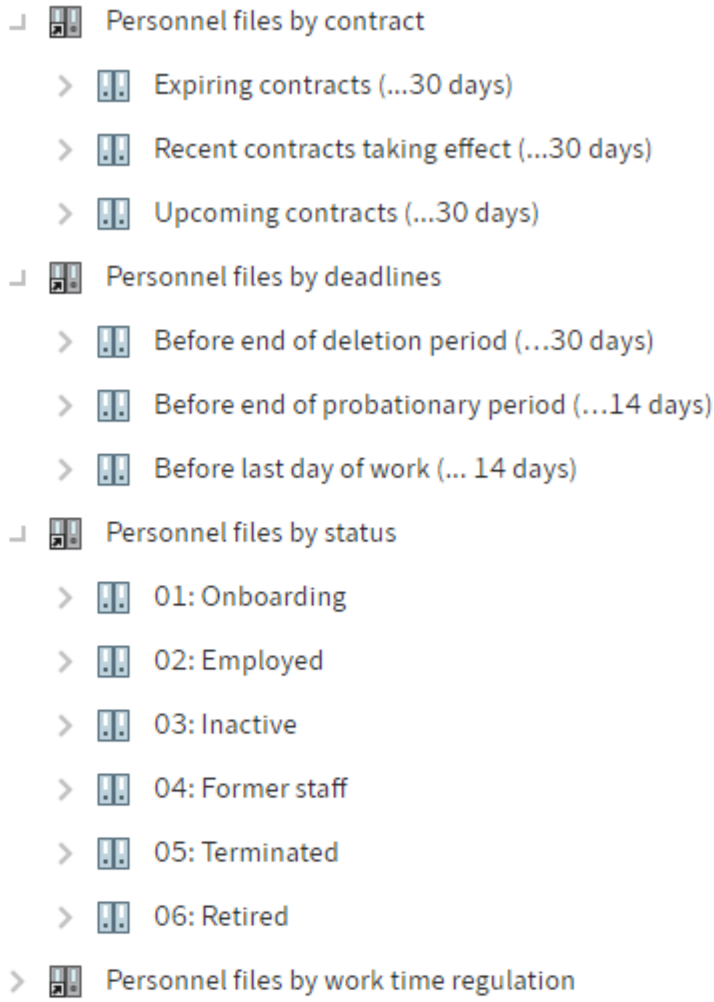

Fig.: Dynamic folders in the repository

Dynamic folders sort the personnel files based on specific criteria, such as deadlines or status.

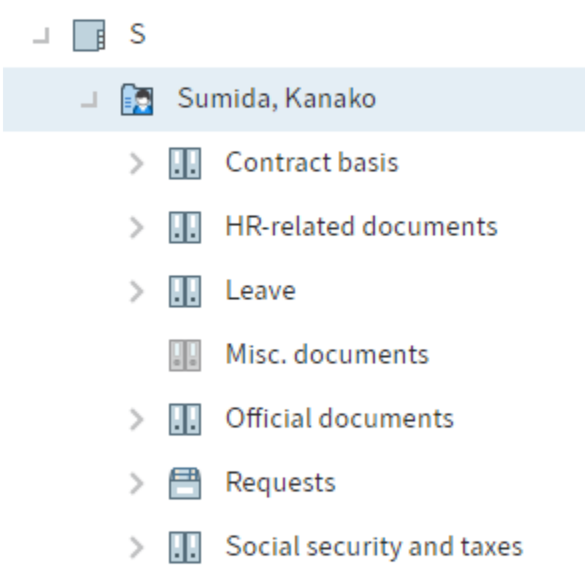

Fig.: Personnel file structure in the repository

Each personnel file in the repository has a pre-defined folder structure.

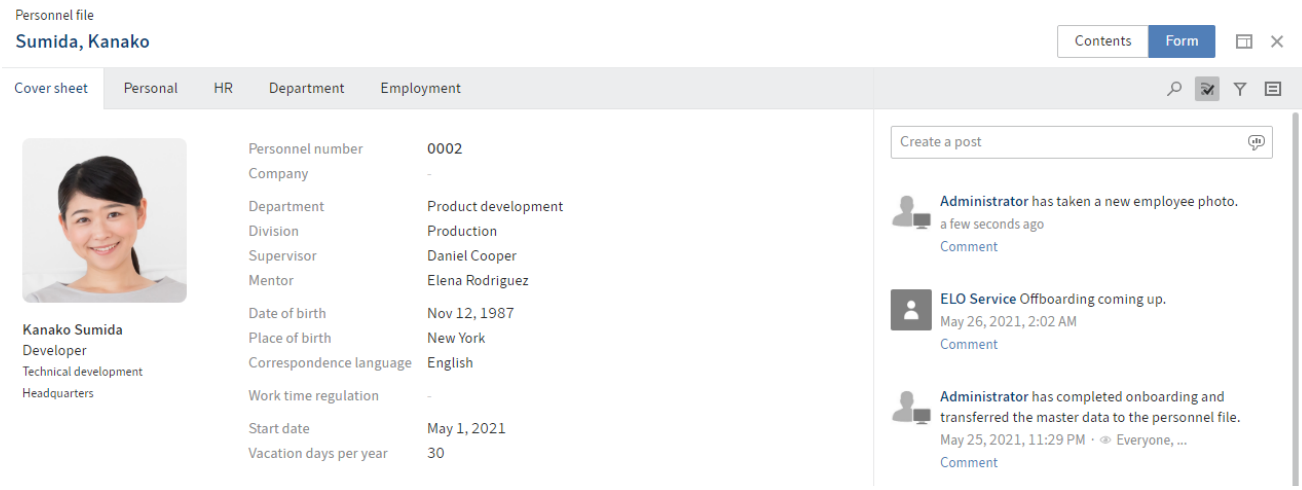

Fig.: 'Cover sheet' tab in the personnel file

The *Personnel file* form consists of the tabs *Cover sheet*, *Personal*, *HR*, *Department*, and *Employment*.

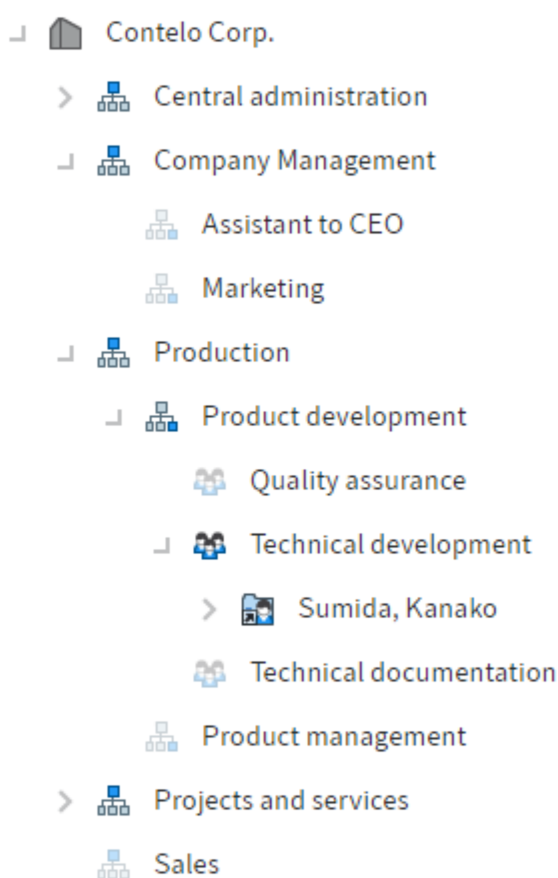

Fig.: Organizational structure in the repository

You can create organizations, divisions, departments, and teams and classify the personnel file accordingly.

Onboarding and offboarding

When employees join or leave your company, you can map the processes using the following functions:

- New employee
- Start onboarding
- Start offboarding

The New employee function creates a personnel file. The Start onboarding function is used to complete the personnel file master data. At the end of this process, the employee file has the status *E – Employed*.

If an employee leaves your company, you can initiate this process in ELO using the Start offboarding function. At the end of the process, the employee is assigned the status *C – Contract terminated*.

Create new employee

Information

A new employee is joining your company. You want to create a new personnel file for her.

Method

1. On the *New* tab, click *HR > New employee*.

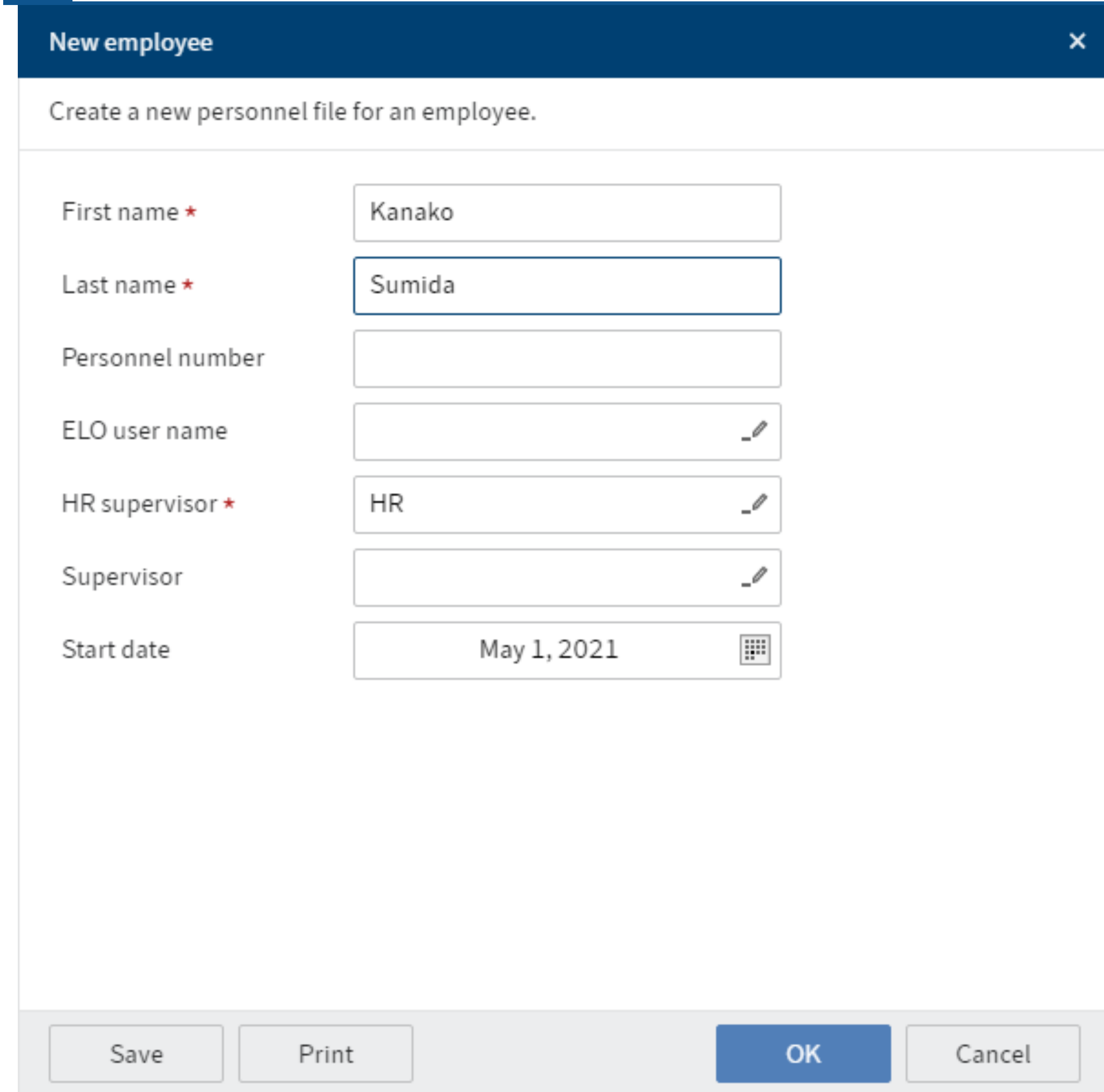

Fig.: 'New employee' dialog box

Optional: If multiple file types have been created, you first have to choose a file type. By selecting a file type, relevant information is automatically entered into the personnel file.

1. Complete the fields in the *New employee* dialog box as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Personnel number: You can enter a number based on your system. If you leave this field blank, a number is automatically generated when a file is stored in the repository.

Information

To give employees access to the functions in the Self-service group on the *New* tab, you have to complete the *ELO user name* field. This means the employee already has to exist as an ELO user. An ELO user name cannot be entered into more than one personnel file.

Result

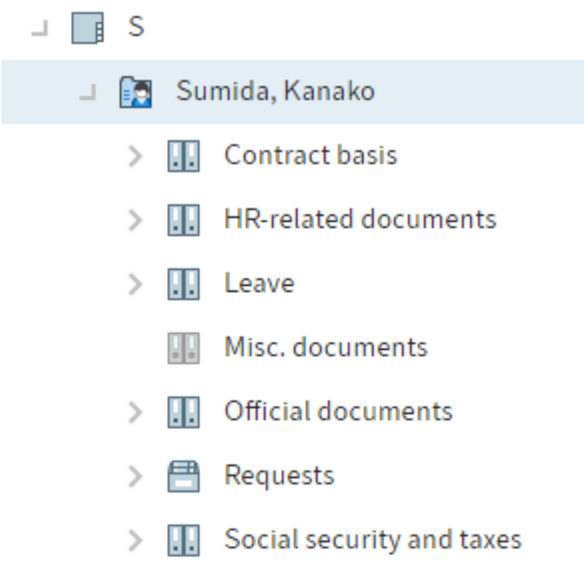

Fig.: Personnel file in the repository

The personnel file is created. It contains child folders where you can file documents for the employee. The status of the personnel file is *O – Onboarding*.

Outlook

After the personnel file has been created, it has to go through the onboarding process.

With the Add picture function, you can add a picture to the candidate file.

Start onboarding

Information

To complete the personnel file for your new employee that you just created with the status *O – Onboarding*, it will have go to through the onboarding process in the next step.

Method

1. Select the personnel file you want to start onboarding for.
2. On the *HR* tab, click *Start onboarding*.

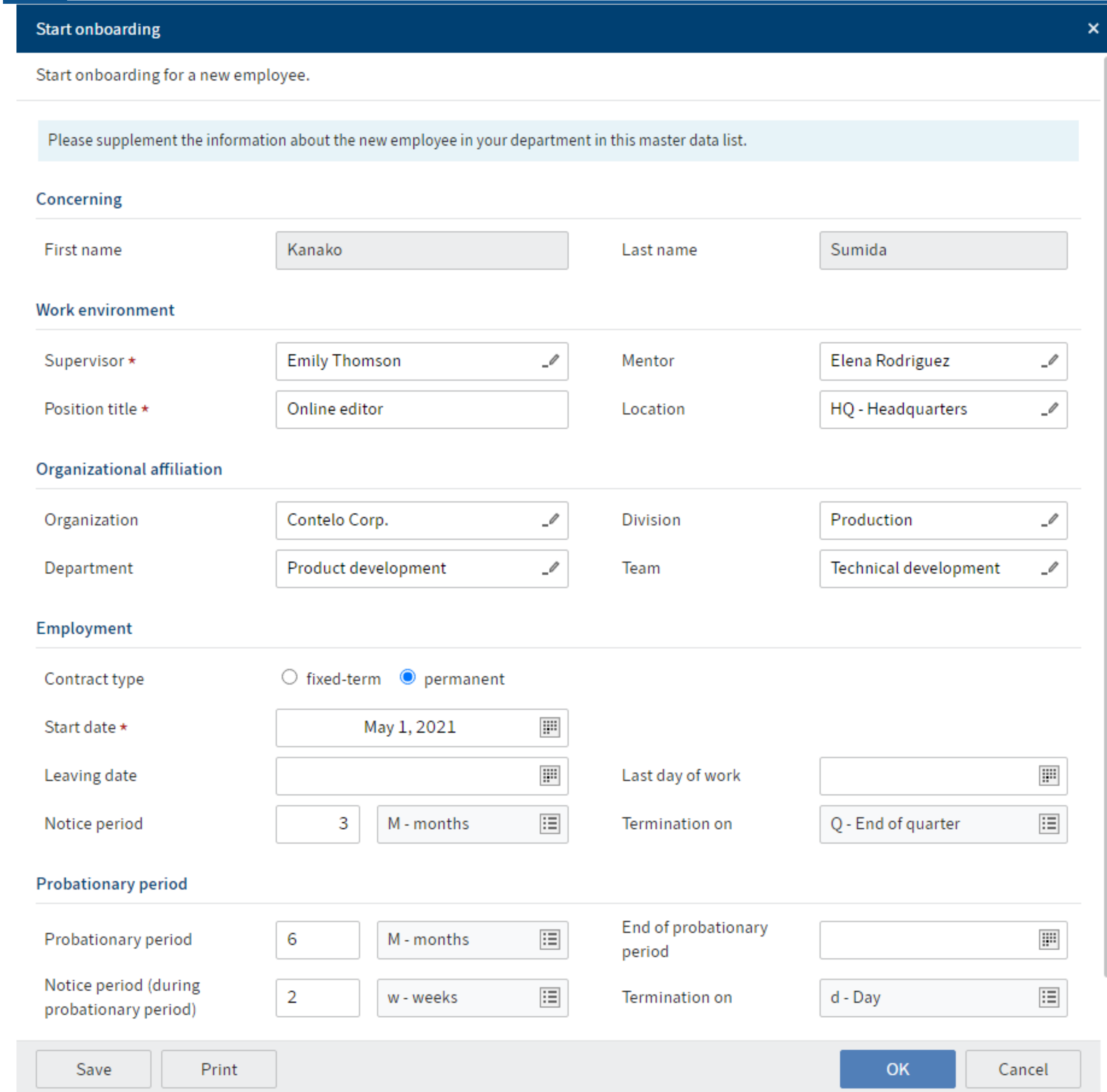

Fig.: 'Start onboarding' dialog box

1. Complete the fields in the *Start onboarding* dialog box as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Information

Filling out the mandatory field *Supervisor* gives the supervisor access rights to the personnel file.

Result

The supervisor or a substitute receives the master data sheet for completion.

Complete master data

Information

As supervisor or substitute for the supervisor, you have received a workflow to complete the master data for your new employee in your *Tasks* work area.

Information

If the supervisor does not use ELO, the workflow is forwarded to a substitute. A substitute for the supervisor is an ELO user with the right to complete the master data.

Method

1. Select the workflow that you want to process.

Optional: Click *Accept workflow*.

You can complete the master data in the form.

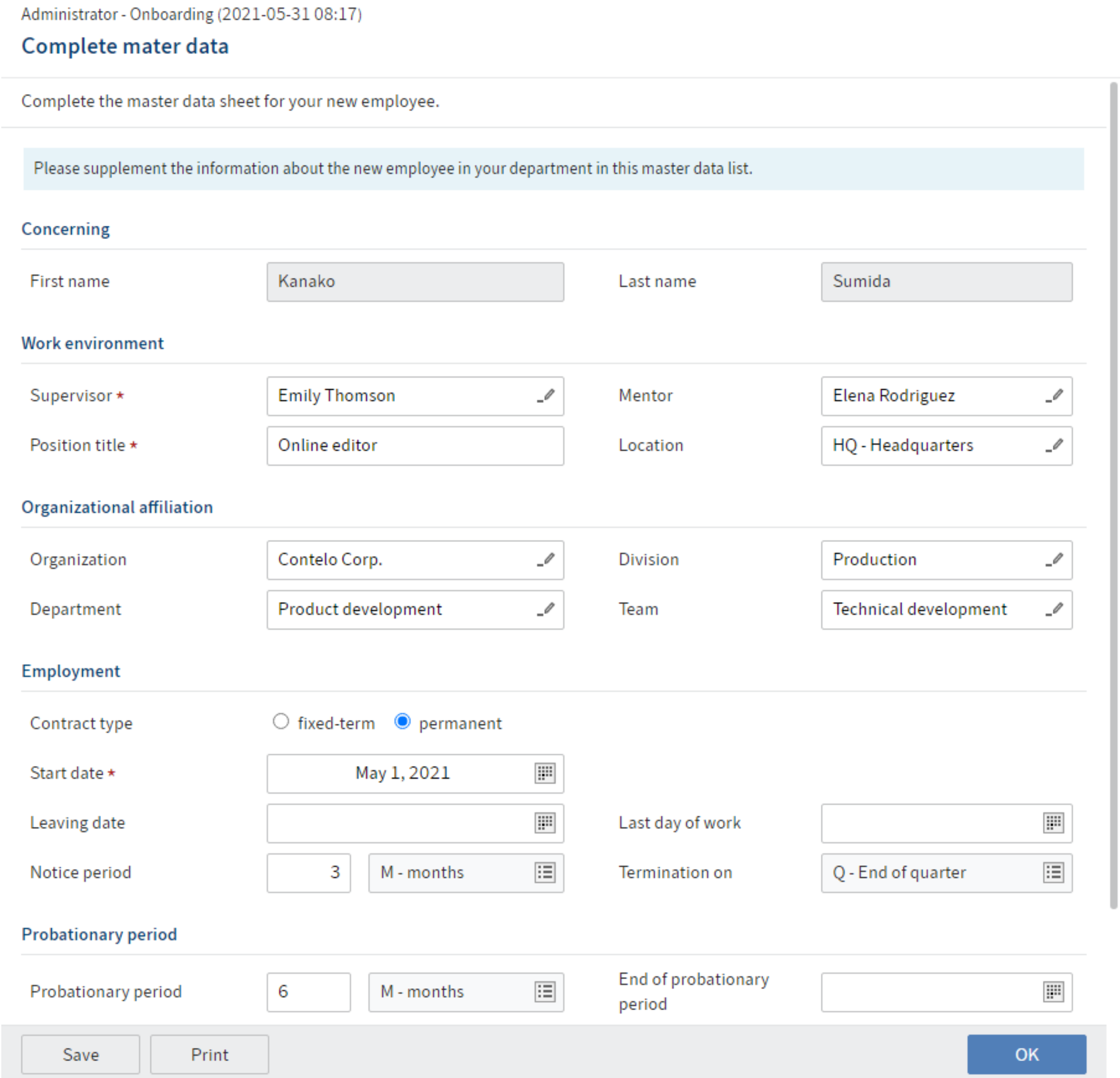

Fig.: 'Complete master data' form

1. Complete the fields as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

1. Click *OK*.

Result

The workflow is forwarded to the HR department.

Check master data

Information

As an employee in the HR department, you have received a workflow in your *Tasks* work area to complete and check the master data for a new personnel file.

Method

1. Select the workflow that you want to process.

Optional: Click *Accept workflow*.

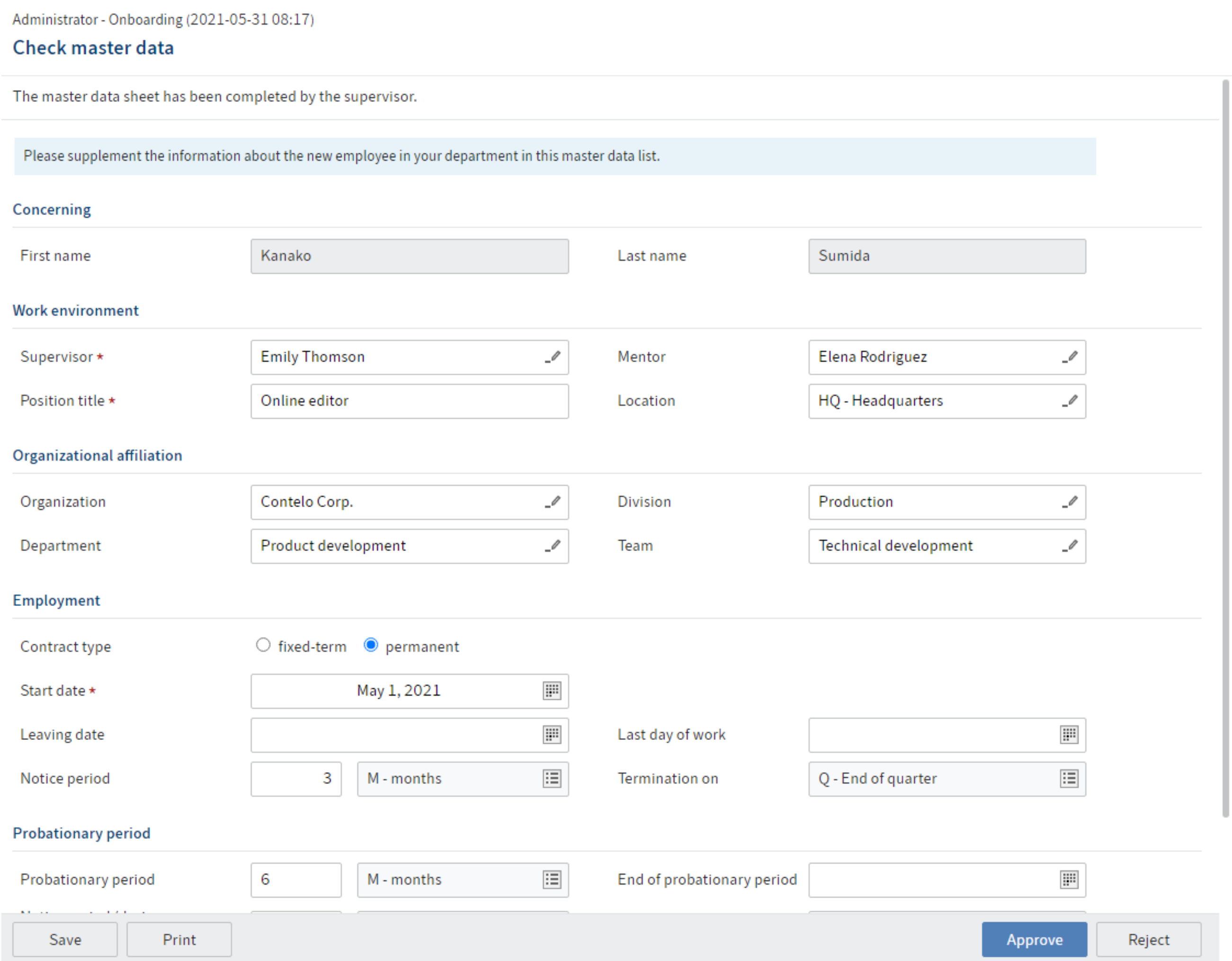

Fig.: 'Check master data' form

1. Check the master data in the form and confirm the entries with *Approve*.

Result

Onboarding is complete. The information entered here will be applied to the personnel file. The status of the personnel file changes to *E – Employed*.

Start offboarding

Information

One of your employees is leaving the company. The offboarding process should be reflected in ELO.

Method

1. Select the personnel file you want to start offboarding for.
2. On the *HR* tab, click *Start offboarding*.

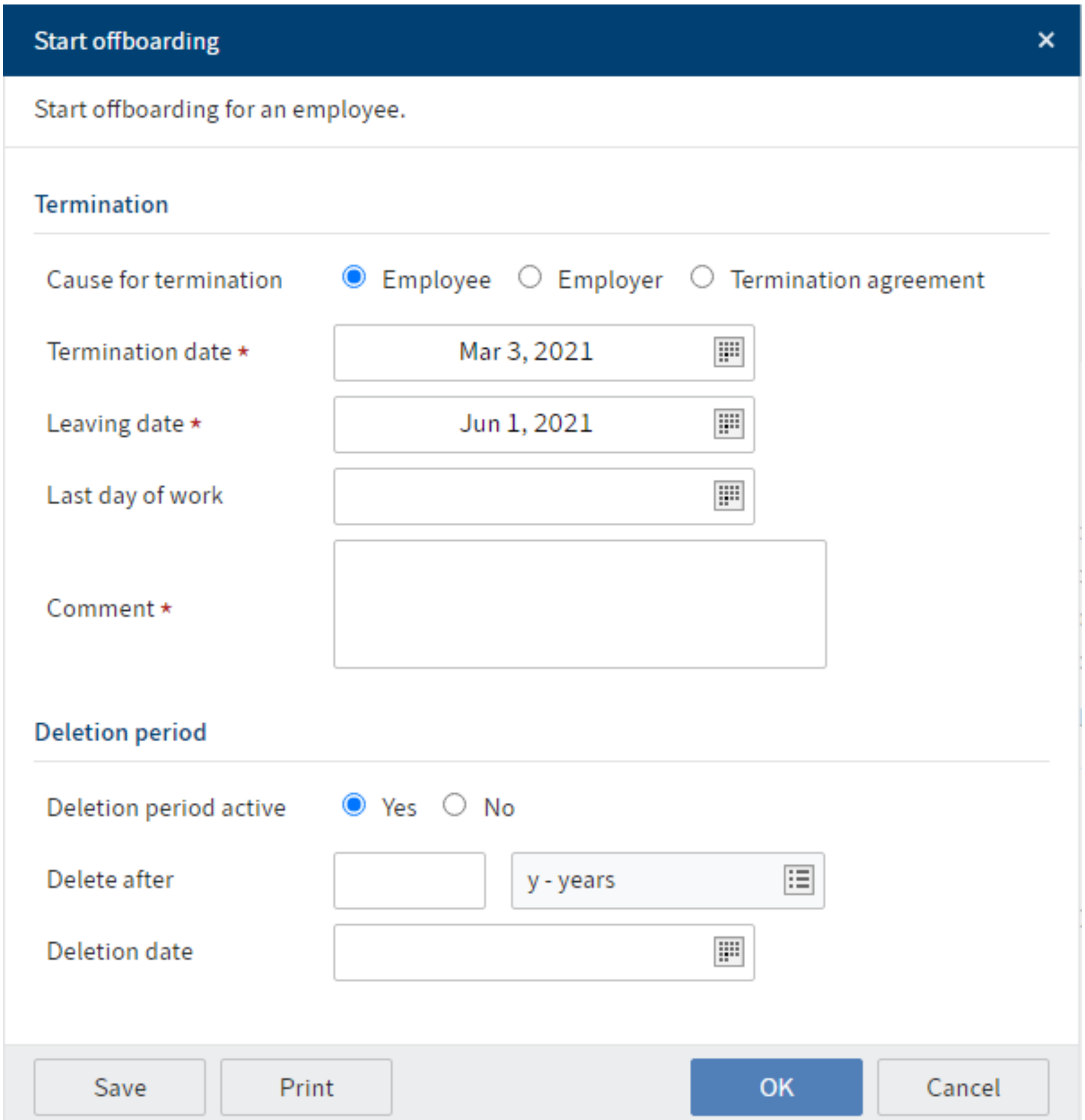

Fig.: 'Start offboarding' dialog box

1. Complete the fields in the *Start offboarding* dialog box as required.

Deletion period active: Click *Yes* to be able to enter a deletion period. If you have entered a deletion period, the HR manager receives a notification once this period has been reached.

Mandatory fields are marked with a red asterisk.

Result

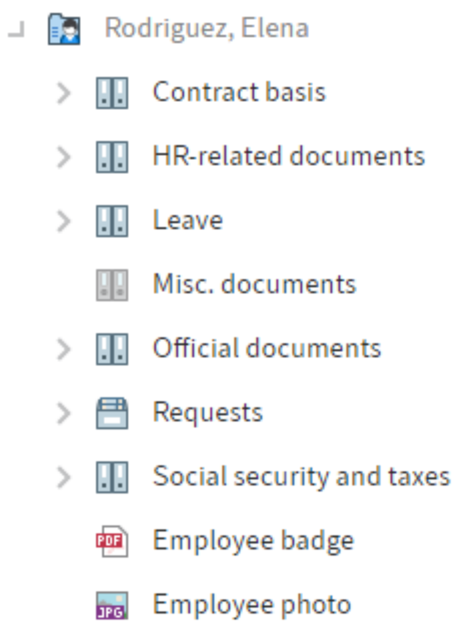

Fig.: Personnel file after offboarding

Offboarding is complete. The status of the personnel file changes to *C – Contract terminated*. The personnel file is shown in a gray font.

Create documents for employees

Using ELO HR Personnel File, you can automatically create documents for your employees that are then stored in their personnel file.

This chapter addresses the following functions:

- Add picture
- Create badge
- Create document
- Update document

Add picture

Information

You want to add a picture of your new employee to her personnel file.

Method

1. Select the personnel file you want add a picture to.

2. On the *HR* tab, click *Add picture*.

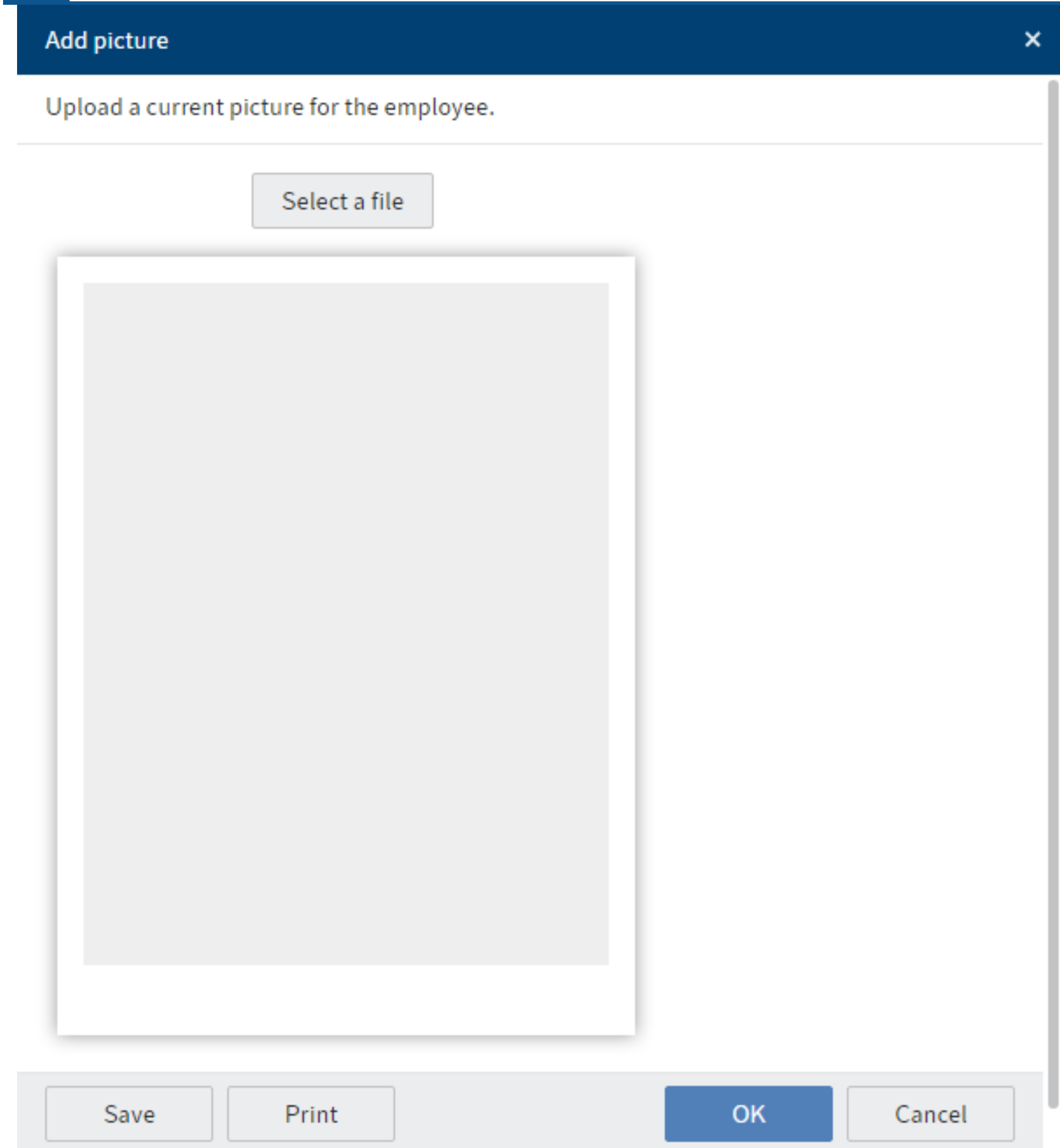

Fig.: 'Add picture' dialog box

1. In the *Add picture* dialog box, you have the following options:

- Take a picture: Using a connected webcam, you can take a picture of the employee on site.
-

Select a file: Select a picture from your Windows file system.

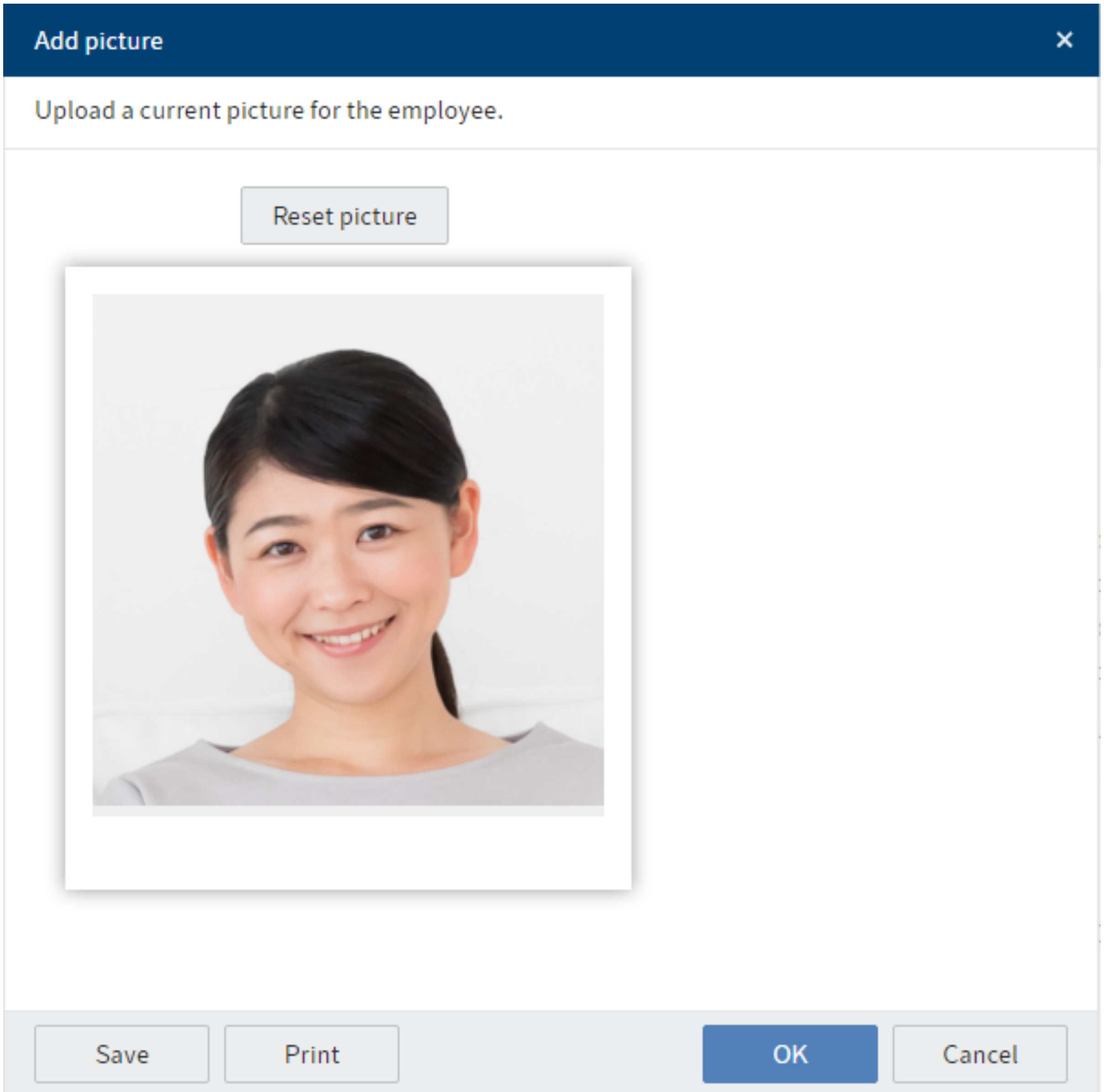

Fig.: 'Add picture' dialog box

1. Click *OK*.

Result

The picture is added to the personnel file.

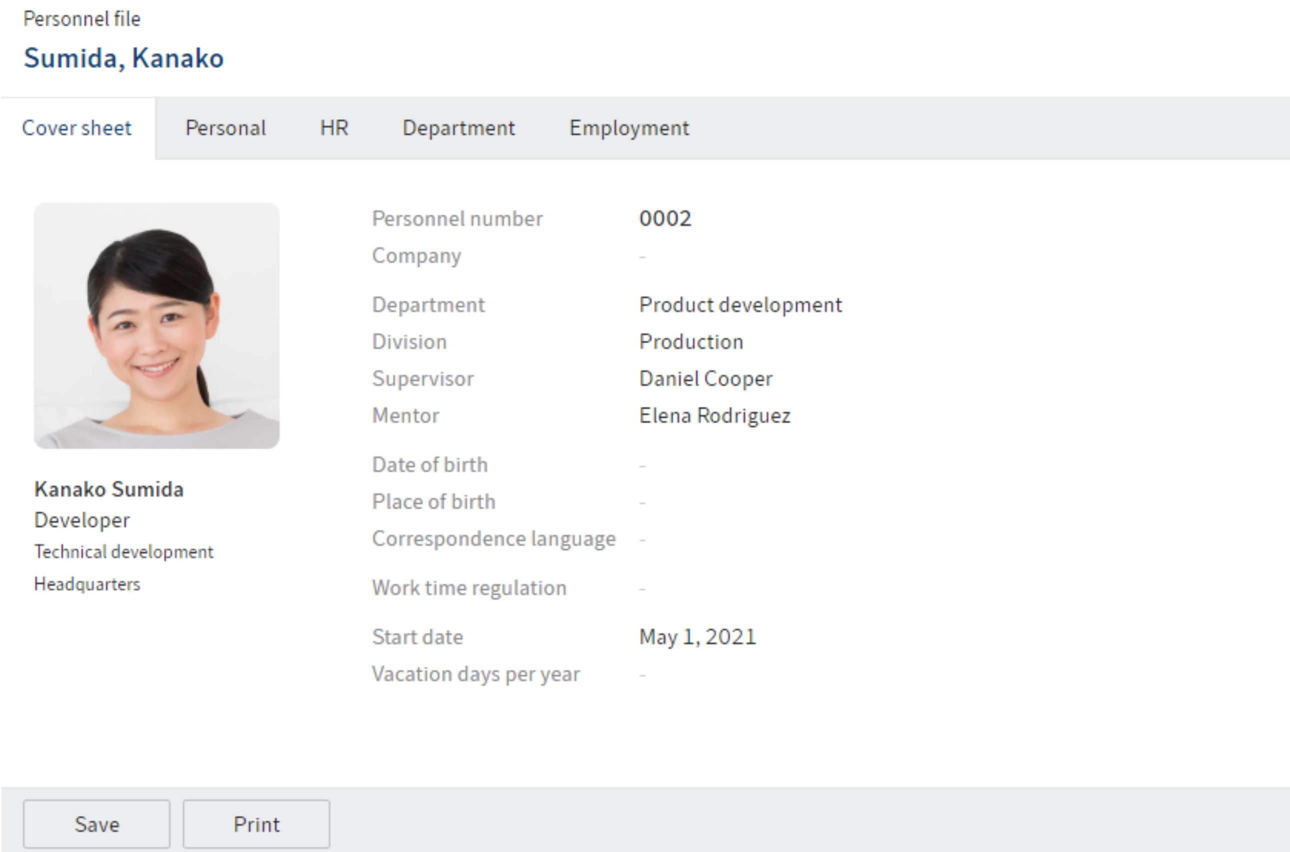

Fig.: Picture in personnel file

The picture is added to the *Overview* tab of the personnel file.

Outlook

If you then create a badge, the image is placed on the badge.

Create badge

Information

You want to create a badge for your new employee.

Method

1. Click the personnel file you want to create a badge for.
2. On the *HR* tab, click *Create badge*.

Result

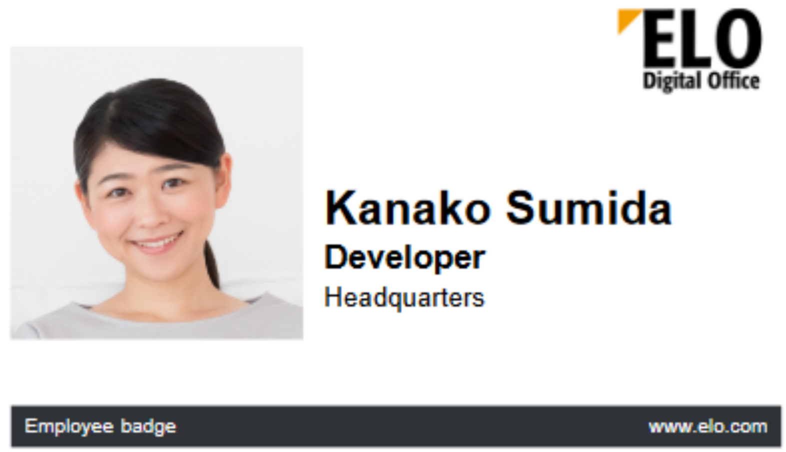

Fig.: Badge

A badge with an employee picture, the employee's name and title in the company, as well as the company logo is created in the personnel file.

Outlook

You can print the badge using a badge printer with Windows printer drivers.

Create document

Information

You want to automatically create contract documents with your new employee's data. Use document templates for this. Document templates contain placeholders that are automatically replaced with the information from the personnel file.

Requirement

At least one document template must be available.

Method

1. Select the personnel file you want create a document for.
2. On the *HR* tab, click *Create document*.

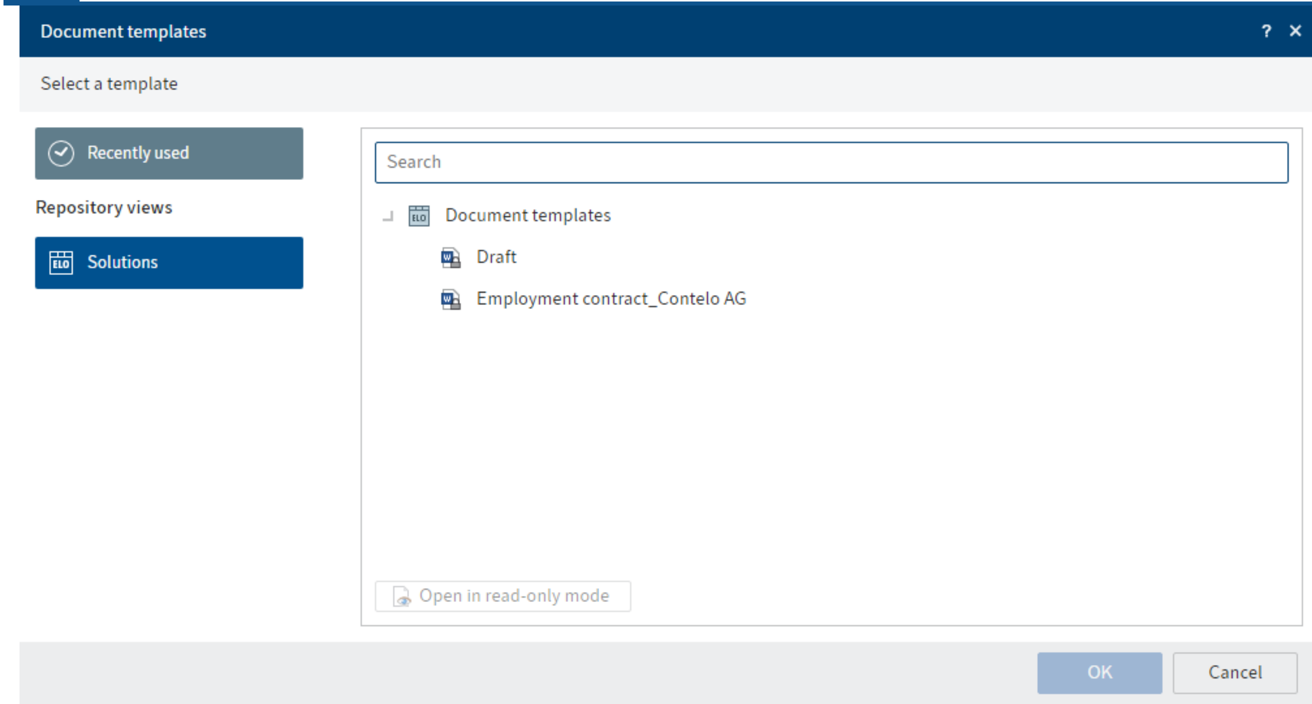

Fig.: 'Document templates' dialog box

1. In the *Document templates* dialog box, select a document template and confirm with *OK*.

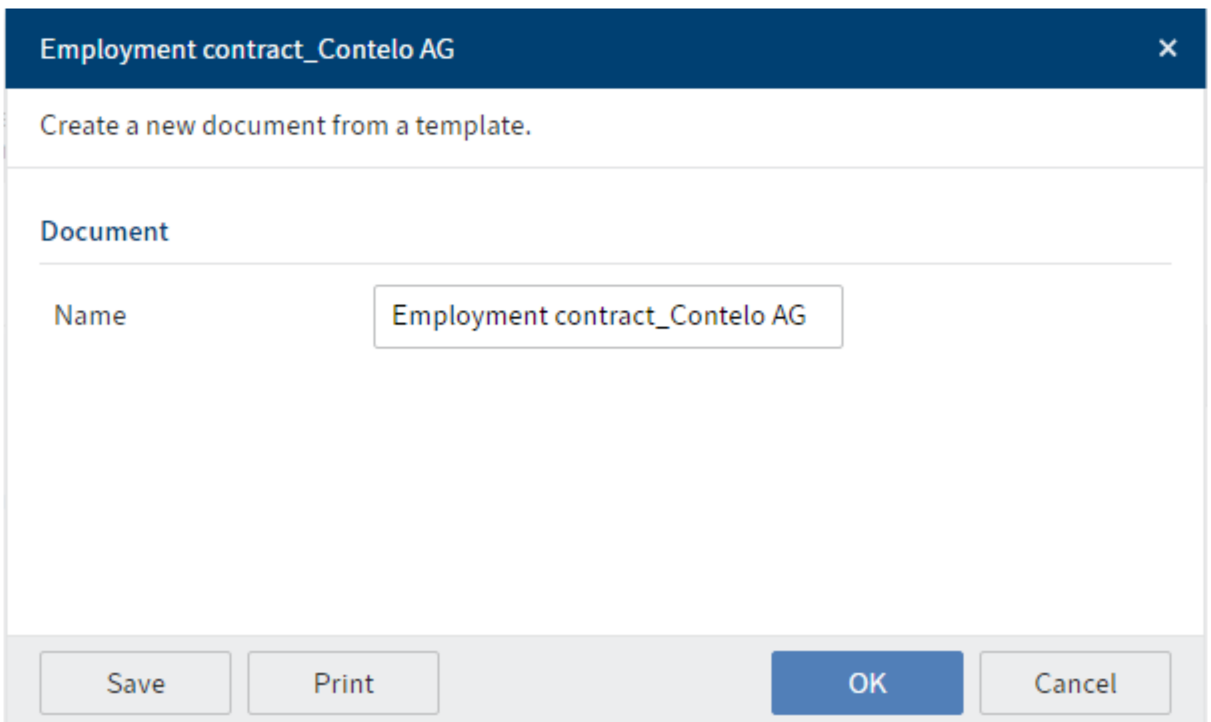

Fig.: 'Create new document' dialog box

1. In the *Create new document* dialog box, you can change the name of the document.

Result

The document is created in the selected personnel file and opened right away.

Outlook

You can edit the document and print it for use.

If your employee's master data changes, you can apply changes using the Update document function.

The *Update document* function has no effect on subsequent changes to the document. It only updates the information automatically transferred from the form.

Update document

Information

If data in the personnel file changes (e.g. new address) after a document has been generated using the Create document function, for example, you can update the document. As a result, you do not have to create a new document or make manual changes to an existing one.

The *Update document* function has no effect on subsequent changes to the document. It only updates the information automatically transferred from the form.

Method

1. Select the document you want to update.

2. On the *HR* tab, click *Update document*.

Result

Old information and blank spaces in the document are replaced with new information from the personnel file.

Create an organizational chart

You can use ELO HR Personnel File to create organizational charts.

You can access organizational charts from the *Organizational chart* tile and via the organization on the *Organizational chart* tab in the repository.

To create an organizational chart, use the following functions:

- New organization
- Expand organization

Create new organization

Information

Organizations provide the foundation for creating organizational charts. An organization has to be created before departments, divisions, and teams can be created.

Requirement

The organization cannot be created within an existing organization.

Method

1. Select the folder where you want to create the organization.

2. On the *New* tab, click *HR > New organization*.

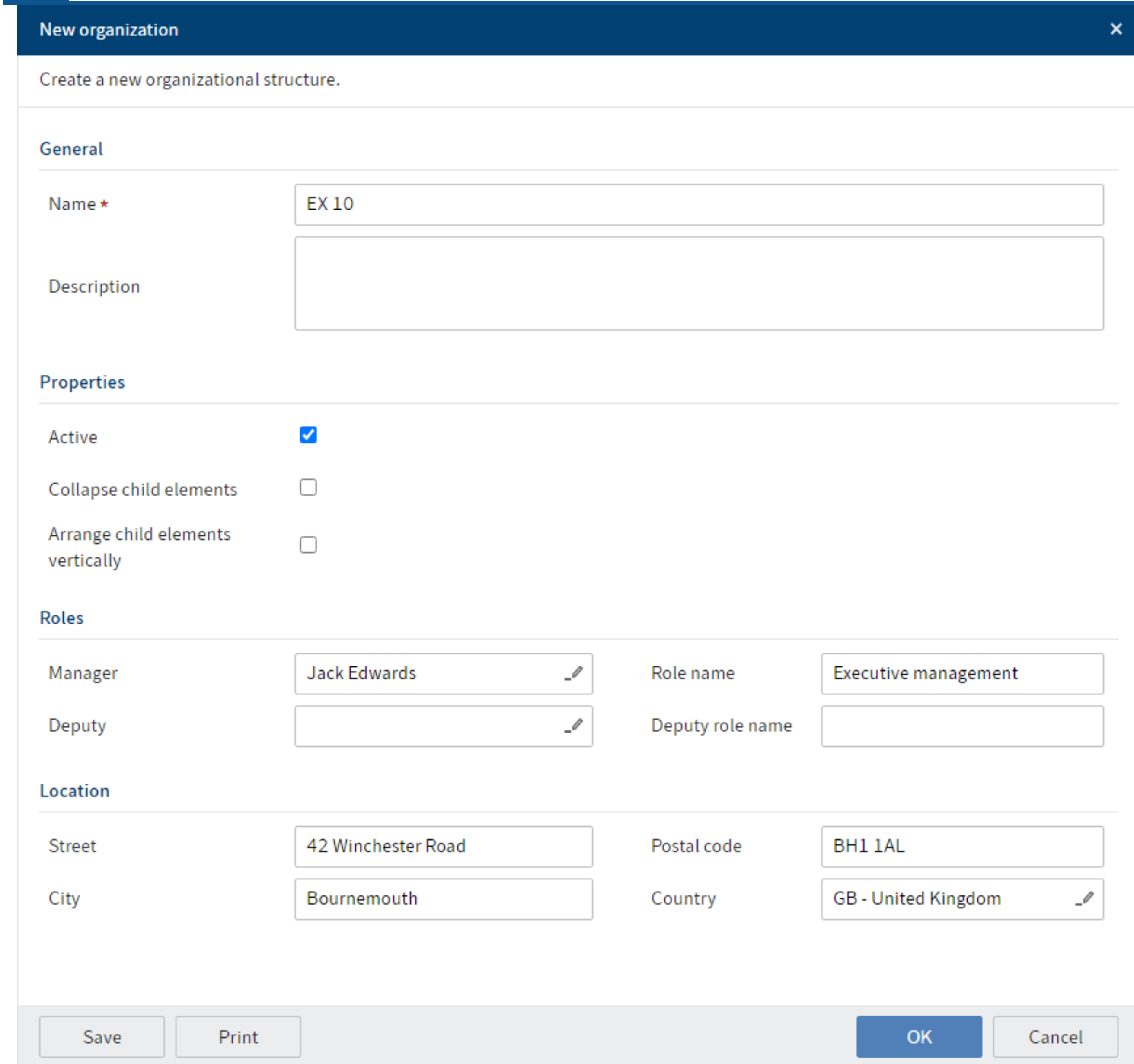

Fig.: 'New organization' dialog box

1. Complete the fields in the *New organization* dialog box as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Active: If you select this option, the organization can be viewed as an organizational chart. If you do not want the organizational chart to be active right away, uncheck this option. You can set it later on via the organization form.

Collapse child elements: If you select this option, the child elements in the organizational chart are displayed collapsed but can be expanded. If you do not select the option, the child elements are shown expanded. This setting only applies to direct child elements.

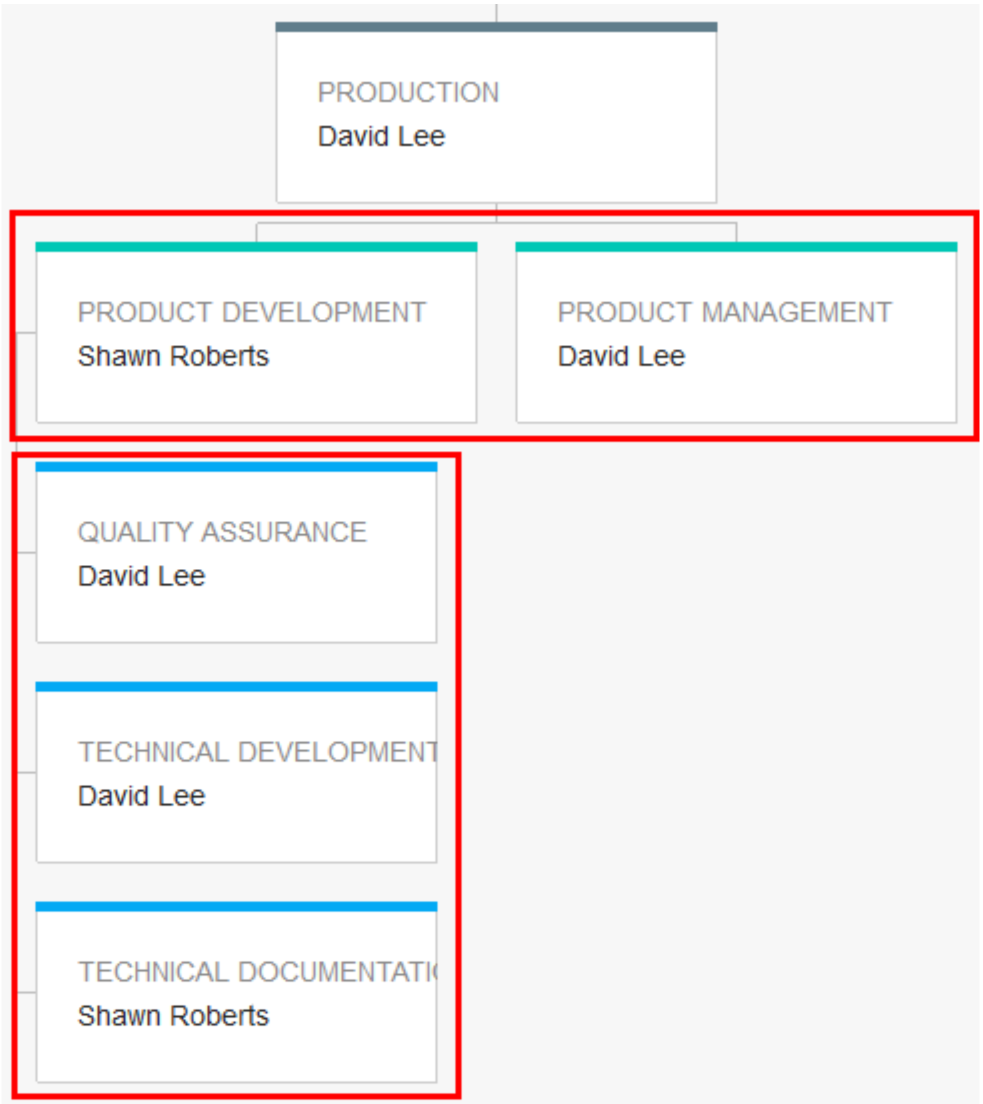

Fig.: Horizontal and vertical display

When you create child elements, you can show them horizontally or vertically.

Arrange child elements vertically: If you select this option, the child elements in the organizational chart are arranged vertically. If you do not select the option, the child elements are arranged horizontally. This setting only applies to direct child elements.

Result

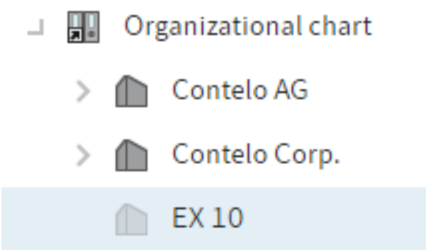

Fig.: Entry in the repository

The new organization is created.

Outlook

You can now structure the organization using the Expand organization function.

You can view the organizational chart by clicking the Organizational chart tile in your *My ELO* area.

Expand organization

Information

You can expand an organization with additional elements.

Method

1. Select the organization you want to expand.
2. On the *New* tab, click *HR > Expand organization*.

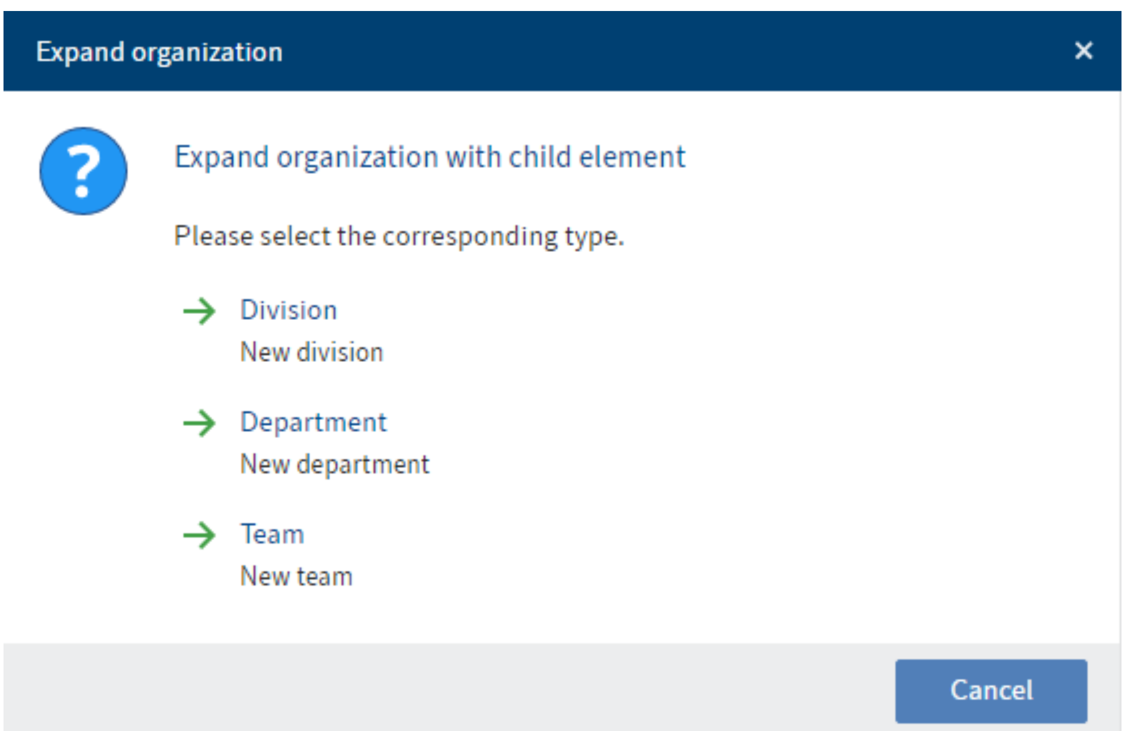

Fig.: 'Expand organization' dialog box

1. In the *Expand organization* dialog box, select the folder you want to create.

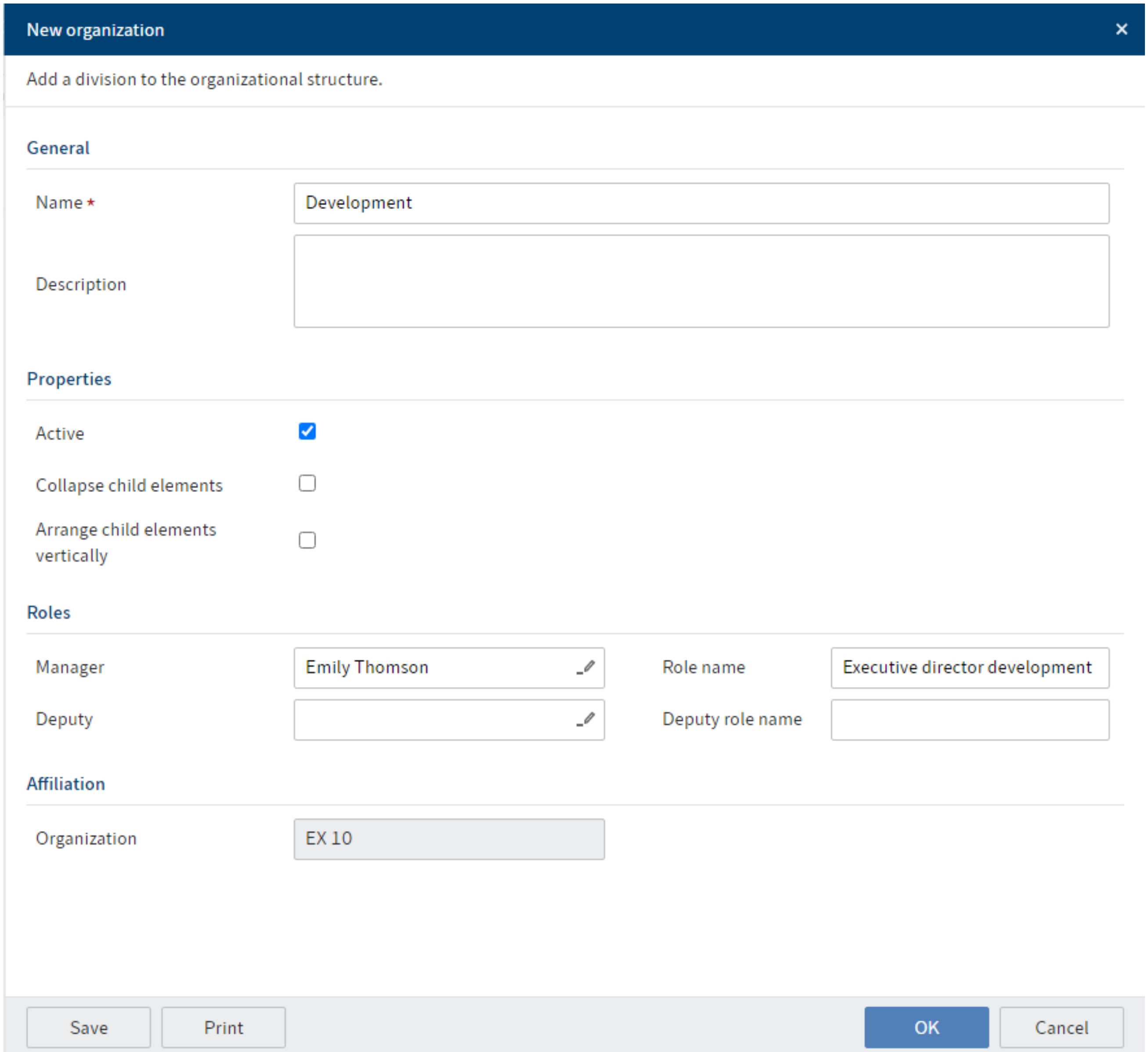

Fig.: 'New organization' dialog box

1. Complete the fields in the *New organization* dialog box as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Active: If you select this option, the element can be viewed as an organizational chart. If you do not want the element to be active right away, uncheck this option. You can set it later on via the element form.

Collapse child elements: If you select this option, the child elements in the organizational chart are displayed collapsed but can be expanded. If you do not select the option, the child elements are shown expanded. This setting only applies to direct child elements.

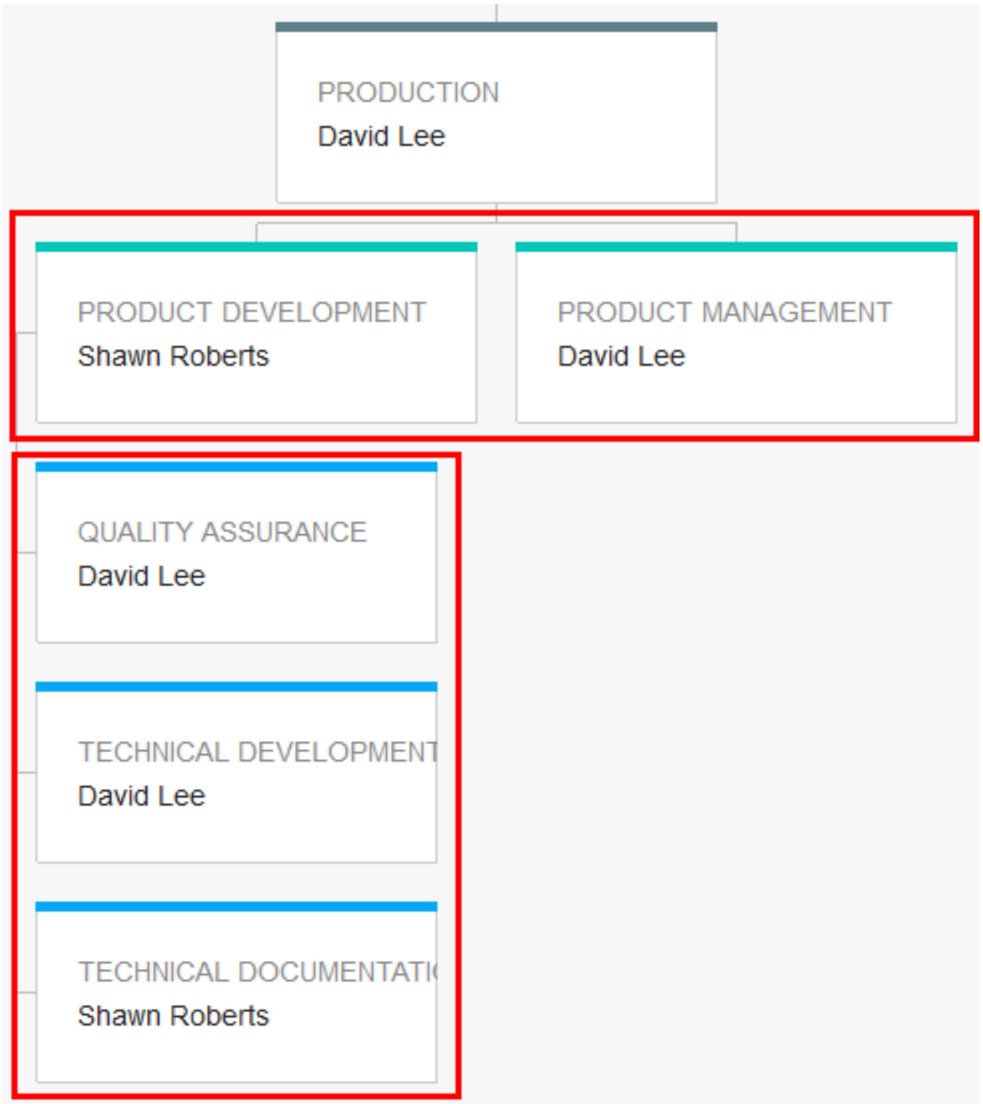

Fig.: Horizontal and vertical display

When you create child elements, you can show them horizontally or vertically.

Arrange child elements vertically: If you select this option, the child elements in the organizational chart are displayed arranged vertically. If you do not select the option, the child elements are shown arranged horizontally. This setting only applies to direct child elements.

Result

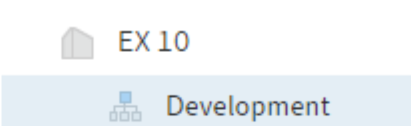

Fig.: Area in the repository

A new folder is created within the organization.

Outlook

You can add and organize the folders. You can assign personnel files to the folders as well.

You can view the organizational chart by clicking the Organizational chart tile in your *My ELO* area.

Overviews

The dashboard and organizational chart help give you an overview of the HR situation and structure of your company.

Dashboard

The dashboard provides an overview of all personnel files and their statuses.

You can reach the dashboard by clicking the *Employees* tile in the *My ELO* area.

The dashboard remembers your settings. When you close then open the dashboard again, it remembers and displays your most recent view.

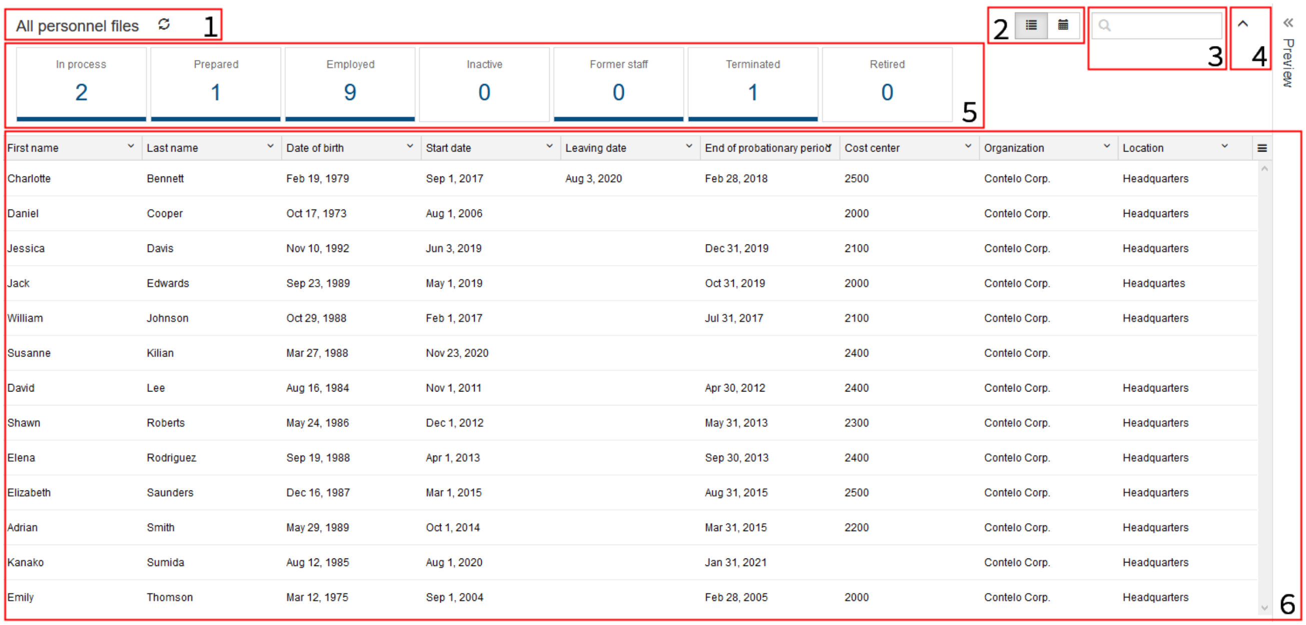

Fig.: Dashboard in the table view

The dashboard is divided into the following areas:

1 Database: In the dashboard header, use the drop-down menu (arrow icon) to select a database. A dashboard database is a list of personnel files that is loaded for evaluation.

> **Information**
>
> If there is only one database, this database is selected permanently and there is no drop-down menu available.

2 Table/Calendar: You can choose between two dashboard views.

3 Search: In addition to text values, you can also search for deadlines. All data that you can select as column values in the table view serves as the basis.

4 Status: The dashboard header contains a button for each status. If a button is active, all personnel files with the corresponding status are shown in the dashboard viewer pane.

5 Viewer pane: In the dashboard viewer pane, you will see a list of personnel files. This list changes depending on the filter criteria applied.

Table

First name	Last name	Date of birth	Start date	Leaving date	End of probationary period	Cost center	Organization	Location
Charlotte	Bennett	Feb 19, 1979	Sep 1, 2017	Aug 3, 2020	Feb 28, 2018	2500	Contelo Corp.	Headquarters
Daniel	Cooper	Oct 17, 1973	Aug 1, 2006			2000	Contelo Corp.	Headquarters
Jessica	Davis	Nov 10, 1992	Jun 3, 2019		Dec 31, 2019	2100	Contelo Corp.	Headquarters
Jack	Edwards	Sep 23, 1989	May 1, 2019		Oct 31, 2019	2000	Contelo Corp.	Headquartes
William	Johnson	Oct 29, 1988	Feb 1, 2017		Jul 31, 2017	2100	Contelo Corp.	Headquarters
Susanne	Kilian	Mar 27, 1988	Nov 23, 2020			2400	Contelo Corp.	
David	Lee	Aug 16, 1984	Nov 1, 2011		Apr 30, 2012	2400	Contelo Corp.	Headquarters
Shawn	Roberts	May 24, 1986	Dec 1, 2012		May 31, 2013	2300	Contelo Corp.	Headquarters
Elena	Rodriguez	Sep 19, 1988	Apr 1, 2013		Sep 30, 2013	2400	Contelo Corp.	Headquarters
Elizabeth	Saunders	Dec 16, 1987	Mar 1, 2015		Aug 31, 2015	2500	Contelo Corp.	Headquarters
Adrian	Smith	May 29, 1989	Oct 1, 2014		Mar 31, 2015	2200	Contelo Corp.	Headquarters
Kanako	Sumida	Aug 12, 1985	Aug 1, 2020		Jan 31, 2021		Contelo Corp.	Headquarters
Emily	Thomson	Mar 12, 1975	Sep 1, 2004		Feb 28, 2005	2000	Contelo Corp.	Headquarters

Fig.: Table view

Clicking an entry shows a preview of the entry. Double-clicking an entry brings you to the repository.

Customize the table view using the drop-down menus.

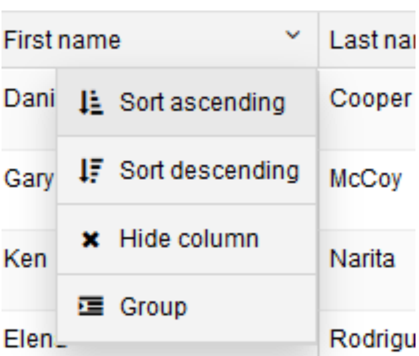

Fig.: Customizing the table view

The drop-down menus in the column headings contain the following functions:

- Sort ascending
- Sort descending
- Remove sorting: This option appears if you have sorted the column. Click *Remove sorting* to clear the sorting option.

Alternative: You can sort the column by clicking the column heading. Clicking once sorts in ascending order. Clicking a second time sorts in descending order. Clicking a third time clears sorting.

- Hide column
- Group: The content of a column is joined into groups. The number of personnel files in each group is shown in brackets. Click the plus icon before the group to expand it and view all contained personnel files. The minus icon minimizes it again. Clicking the plus icon in the header expands all groups.

> **Information**
>
> You can combine multiple groups. You can specify a hierarchy with the order in which you select the columns.

- Ungroup: This option appears if you have grouped items.

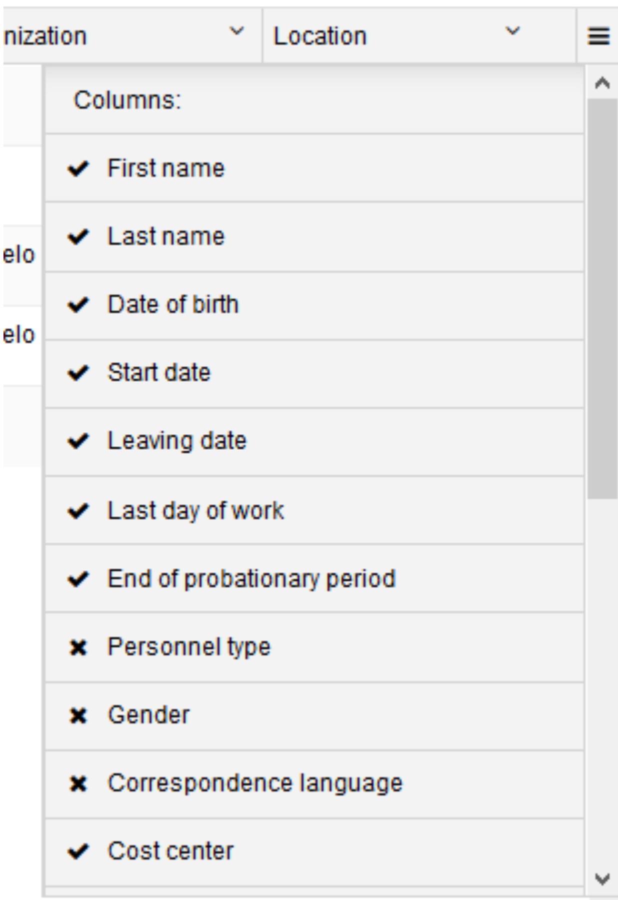

Fig.: Overview of all columns

Menu: You can show hidden columns.

Calendar

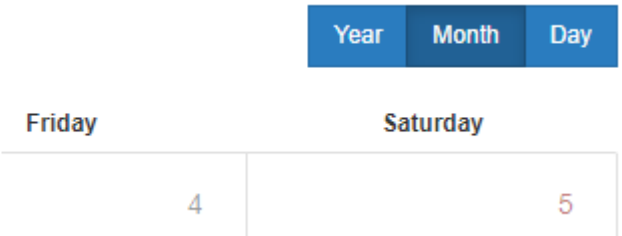

Fig.: 'Year', 'Month', and 'Day' buttons

The calendar offers three options: *Year*, *Month*, and *Day*.

Data from the personnel file is shown in all views.

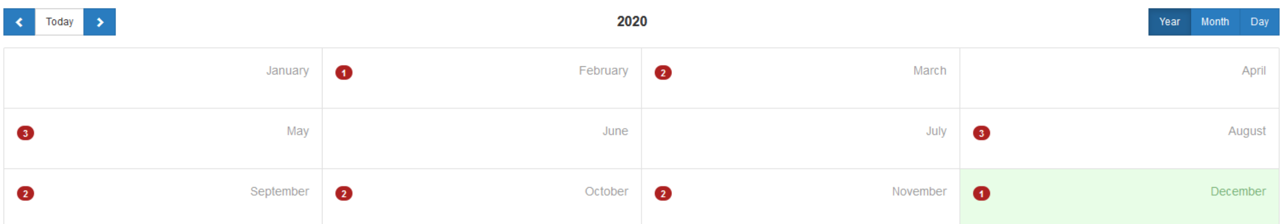

Fig.: Annual view

Year: The annual view shows the number of deadlines each month. For more detailed information on a month, click the month.

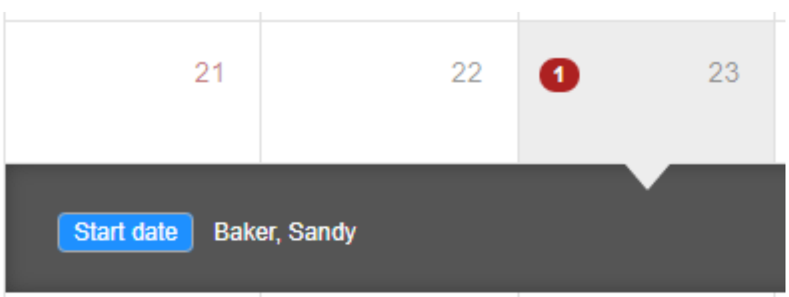

Fig.: Month view

Month: The month view shows the number of deadlines each day. For more detailed information on a day, click the day.

To preview a personnel file, click the deadline.

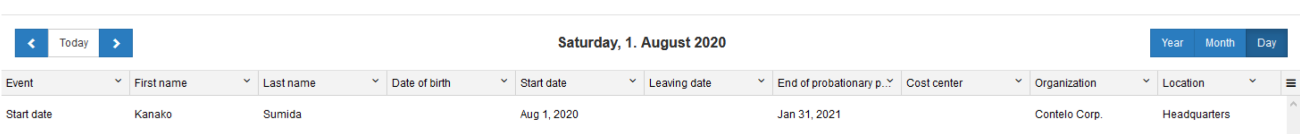

Fig.: Day view

Day: The day view lists the deadlines for the selected day. It works in the same way as the table view.

Organizational chart

Organizational charts give you an overview of the structure of an organization.

You can reach the organizational chart by clicking the *Organizational chart* tile in the *My ELO* area.

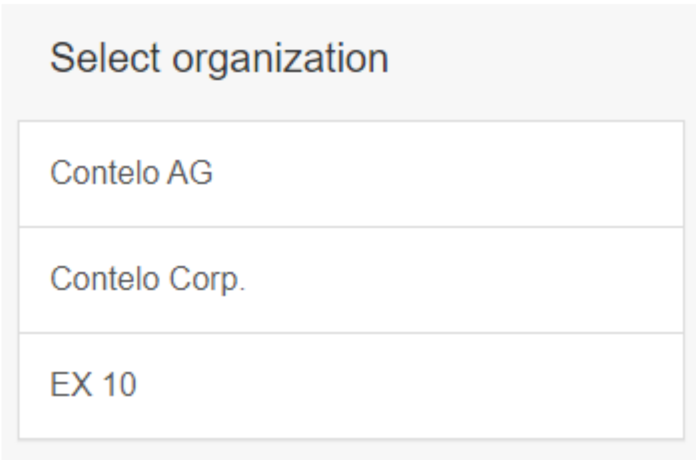

Fig.: Selecting an organization

Choose the organization you want to show in an organizational chart.

> **Information**
>
> If only one organization is created, you will be forwarded straight to the respective organizational chart.

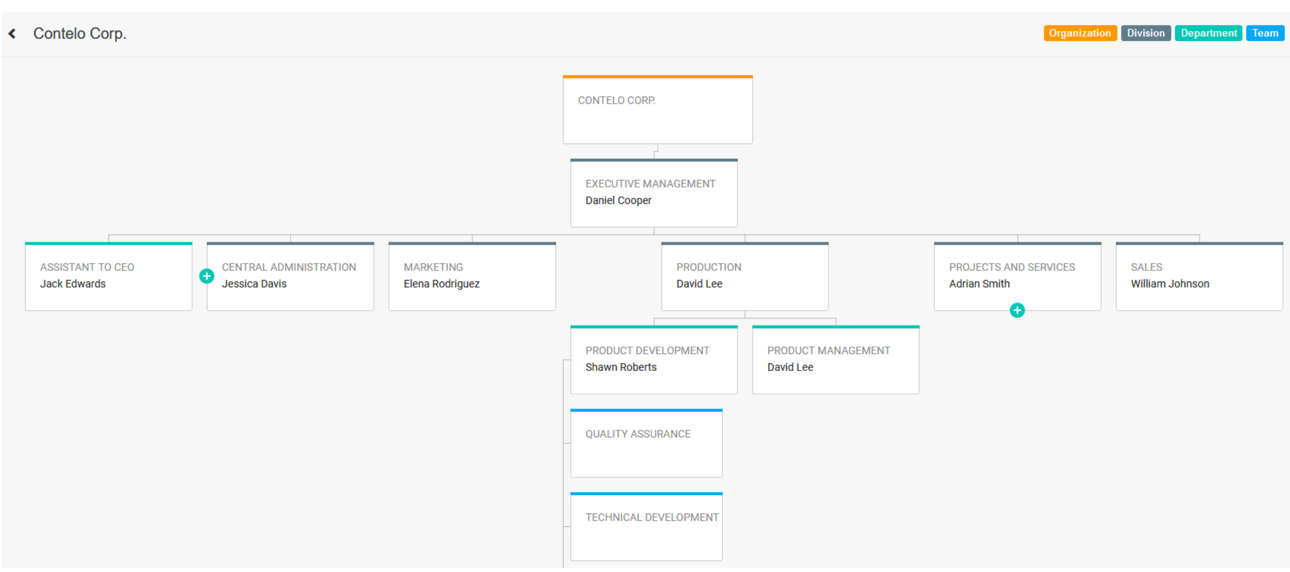

Fig.: Organizational chart

If the child elements are collapsed, click the plus icon to expand them.

You can collapse the child elements by clicking the minus icon.

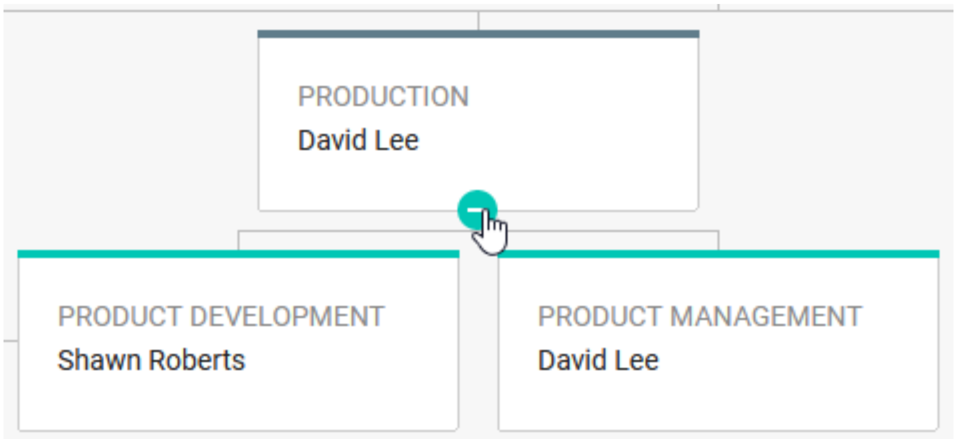

Fig.: Minus icon

Information

The minus icon appears as soon as you mouse over the element whose child elements you want to collapse.

Self-service

ELO HR Personnel File offers functions that allow employees to initiate HR processes.

Change HR data

Information

As a company employee, you can change your own HR data, for example after moving.

Method

1. On the *New* tab, click *Self-service > Change HR data*.

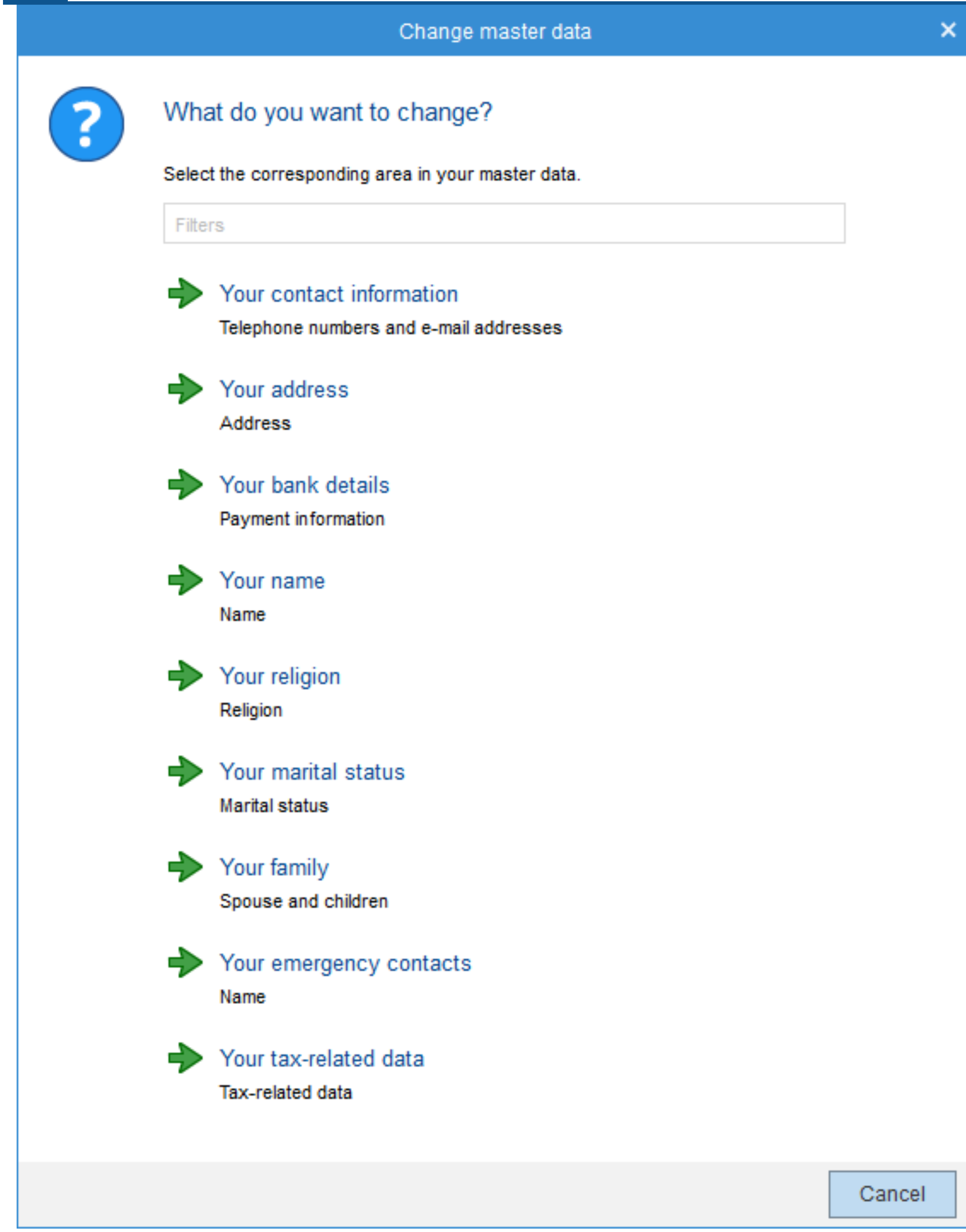

Fig.: 'Change master data' dialog box

1. In the *Change master data* dialog box, select the data you want to change.

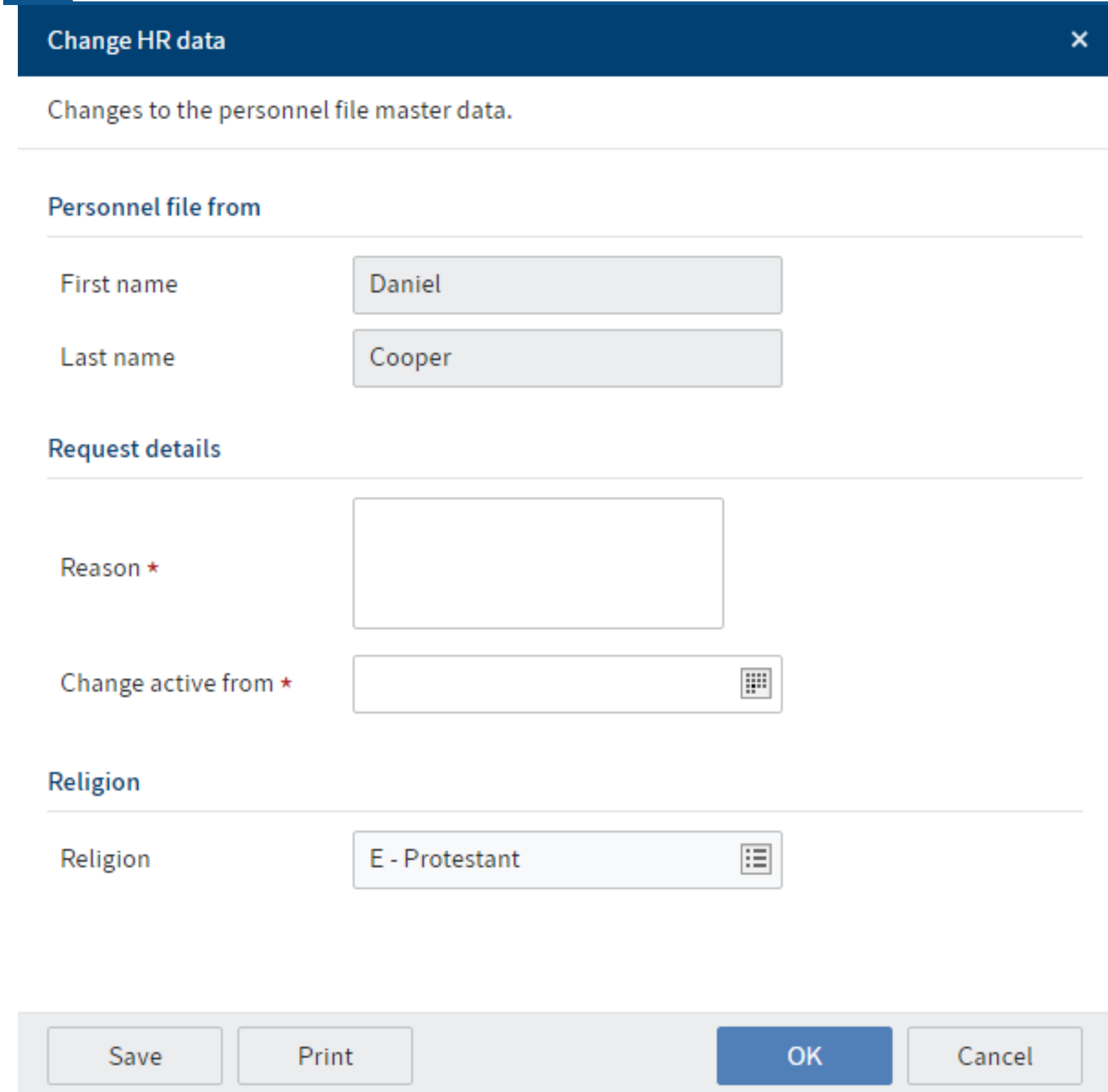

Fig.: 'Change HR data' dialog box

1. In the *Change HR data* dialog box, enter your changes.

Mandatory fields are marked with a red asterisk.

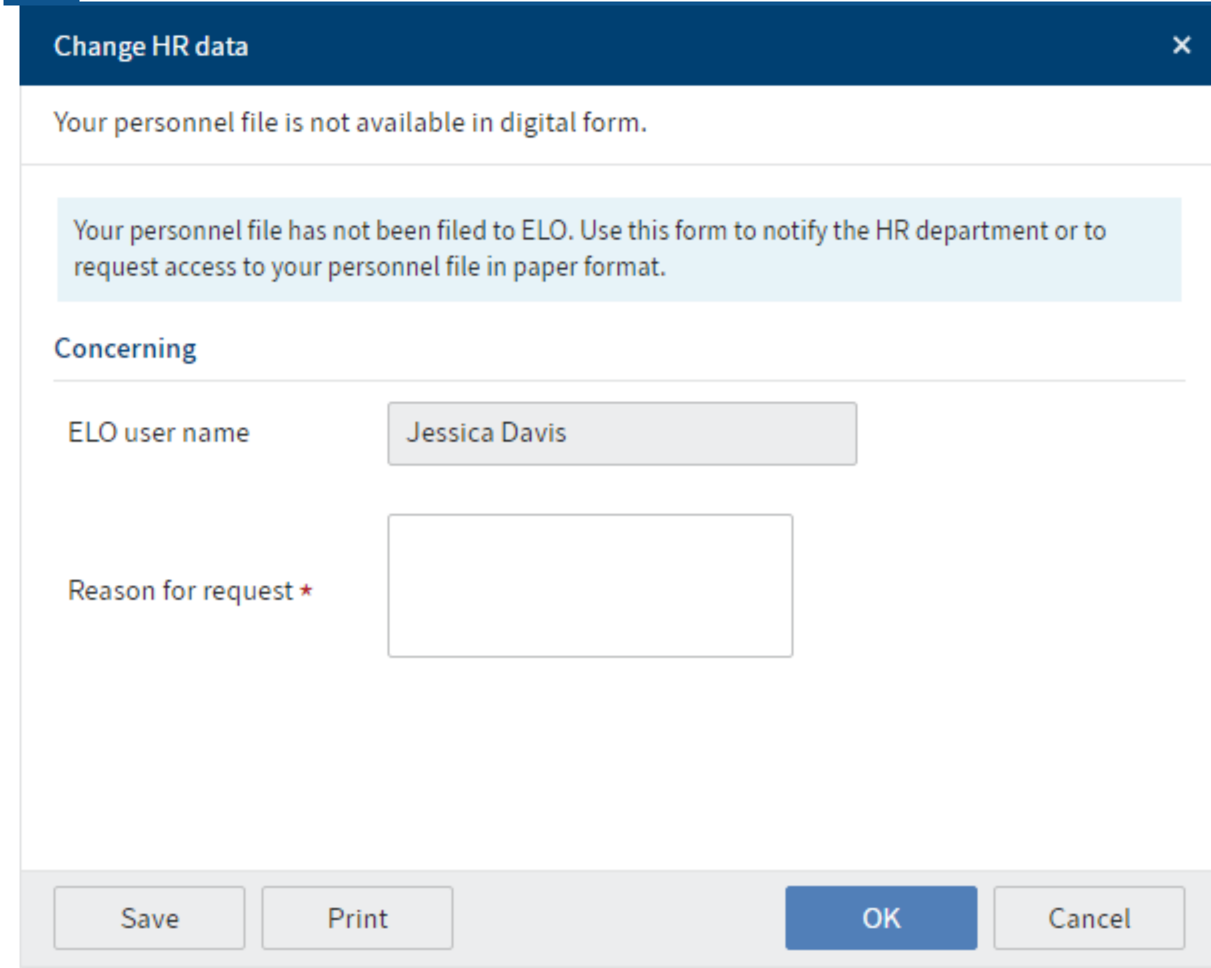

Fig.: 'Change HR data' dialog box

If a personnel file has not yet been created for you in ELO, a dialog box appears instead of the change request so you can notify the HR department.

Result

The HR department receives the change request for confirmation.

Once the date in the *Change active from* field has been reached, the changes are applied to the personnel file.

Access personnel file

Information

On request, you can access your own personnel file or the file of an employee if you are their supervisor.

Method

1. On the *New* tab, click *Self-service > Access personnel file*.

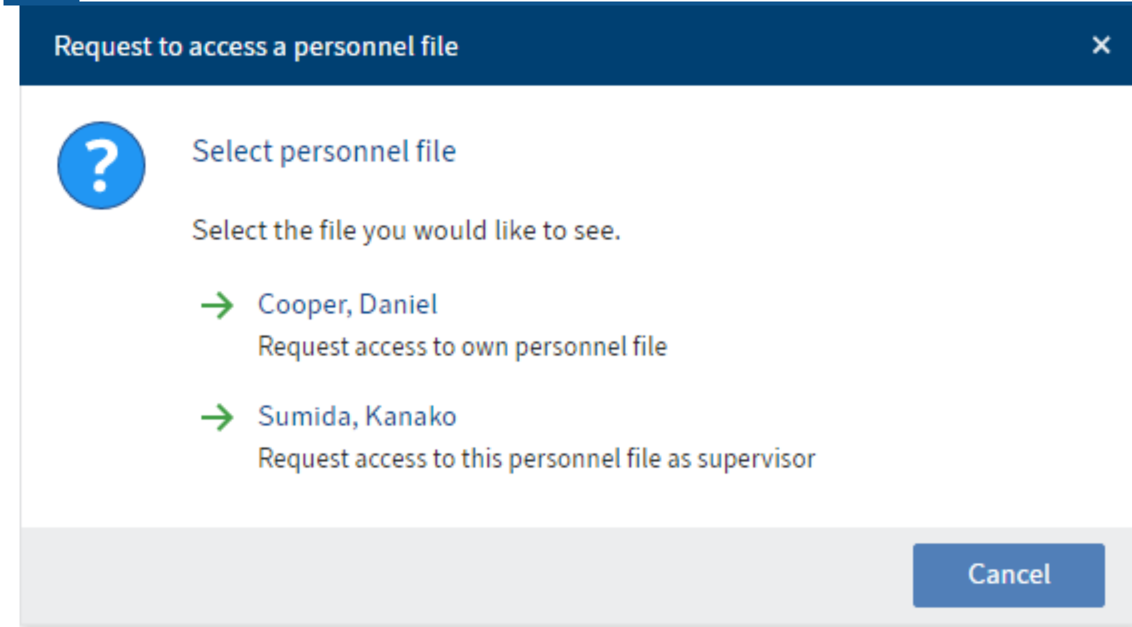

Fig.: 'Request to access a personnel file' dialog box

Optional: If you want to request access to a personnel file as a supervisor, select which personnel file you want to view in the *Request access to personnel file* dialog box.

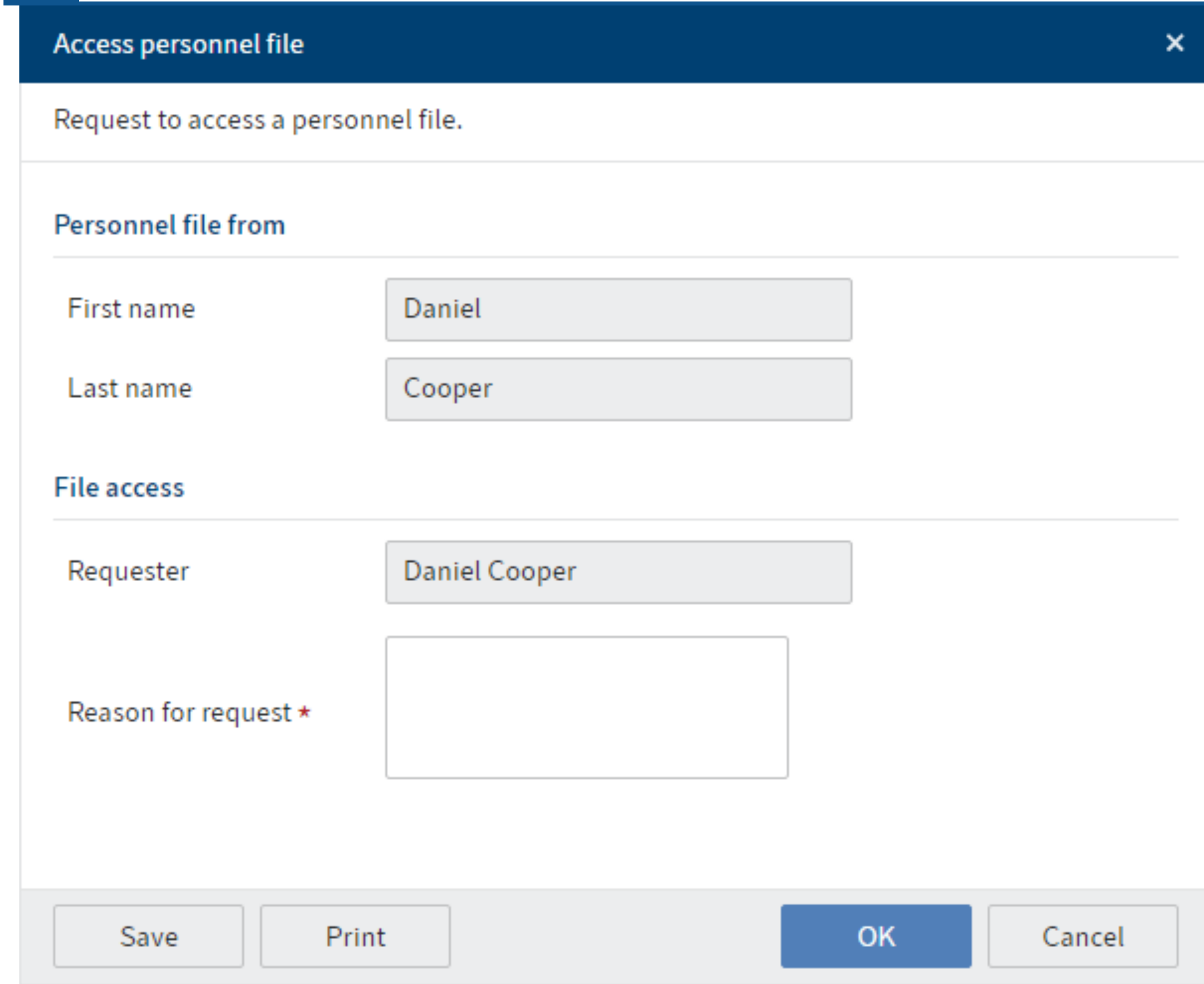

Fig.: 'Access personnel file' dialog box

1. Enter the reason for your request in the *Access personnel file* dialog box.

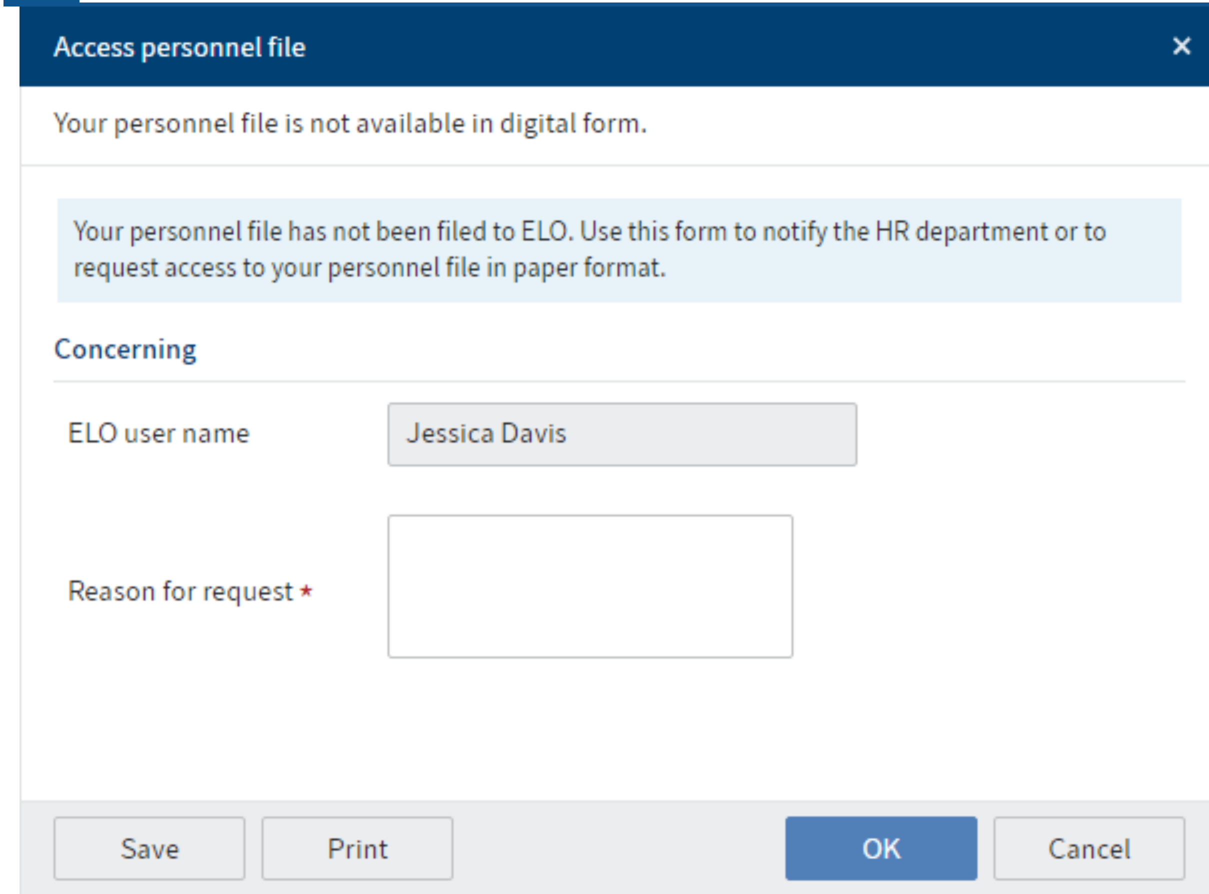

Fig.: 'Access personnel file' dialog box

If a personnel file has not yet been created for you in ELO, a dialog box appears instead of the request to access the personnel file so you can notify the HR department.

Result

The HR department receives your request to access the personnel file.

Once the HR department has approved your request, your personnel file will appear in your *Tasks* work area.