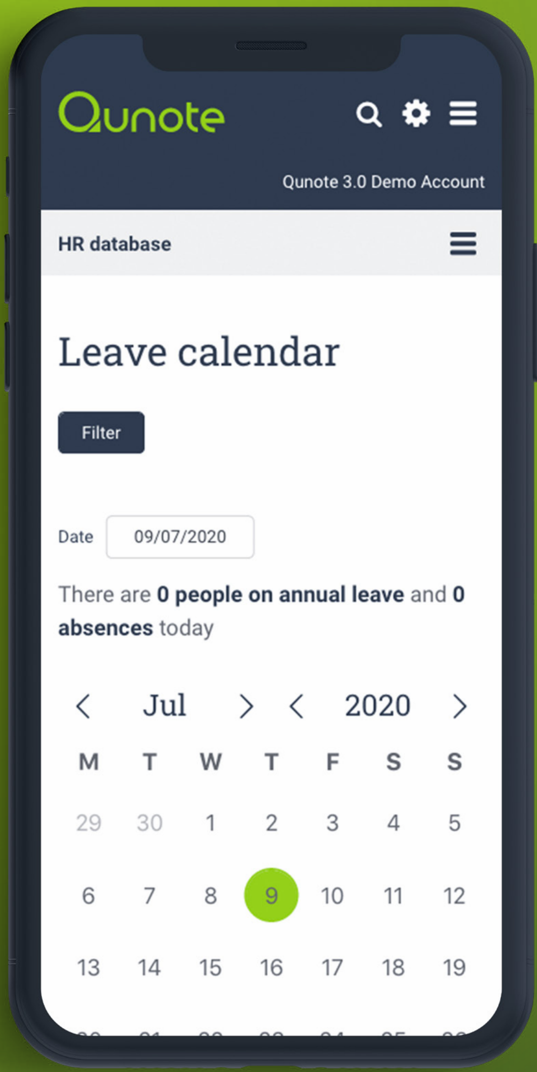
Qunote

HR database mini-guide



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TO HELP KEEP EVERYTHING IN ONE PLACE, YOU CAN NOW RECORD COMPREHENSIVE HR RECORDS FOR ALL MEMBERS OF STAFF ON QUNOTE.

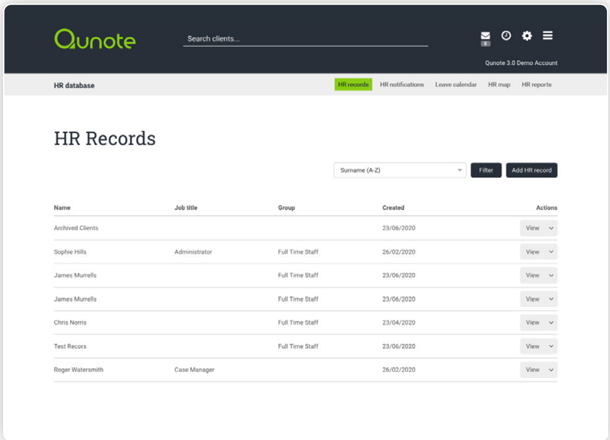
Within each staff member's HR file you can:

- Record personal information, contact details, qualifications, skills, dependants, health information, vaccinations, bank account details and much more.
- Add your own custom fields and checks.
- Upload documentation (for example, copies of contracts and certificates)
- Track annual leave and absence
- Create and maintain training logs

A selection of HR reports and notifications can be generated from this data, allowing you to stay informed of key HR information such as upcoming expiry dates for training and DBS check dates.

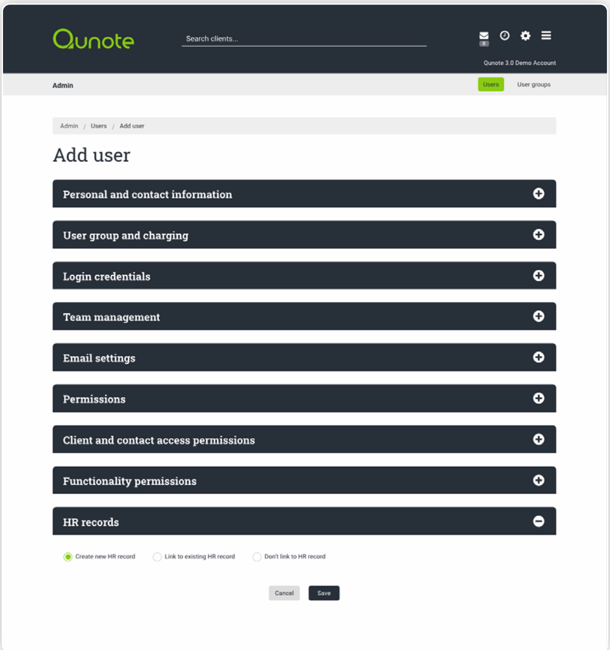
ACCESS THE HR DATABASE

To access your company's HR records, go to **User Section > HR database**. Use the sort drop-down box and Filter button to search for a staff member's HR record, and click the **Actions** menu beside a staff member's name to view, edit or delete their HR record.



ADD AN HR RECORD

When you add or edit a Qunote user in the **Admin > Users section**, you have the option to quickly create a HR record for the user based on the user details already entered. Under the HR records section of the user details form, simply select **Create new HR record** and press **Save**.



An HR record will be automatically created for the user in the HR Database. The HR record and the user profile will be linked together. You can complete the rest of the staff member's HR details and edit their HR record at any time by selecting going to **User section > HR database** and clicking **Edit** from the drop-down box beside their name.

You can manually create a HR record (for example, for someone that is not a Qunote user) by going to **User Section > HR database** and clicking the **Add HR record** button on the right-hand side of the page.

When adding or editing an HR record, you can specify the following information:

PERSONAL INFORMATION

Enter the staff member's name and job title. You can assign the staff member to a staff 'group' and select their 'skills' from a drop-down list.

Please note: Putting staff HR records into 'groups' helps you organise and filter your staff records. You can create HR groups by going to **Admin section > HR** and clicking **Groups** from the top menu. Click the **Add group** button and enter a group title. For example, you might organise your HR records into full-time, part-time and archived staff etc.

Indicating each staff member's skills also enhances the search and filtering options, helping you identify suitable staff to assign to a client. To create a list of skill options, go to **Admin > HR** and click **Skills** from the top menu. Then click the **Add skill** button.

ADDITIONAL INFORMATION

Here you can record additional staff details, such as date of birth, NI number, driving licence number and qualifications held.

You can also add your own custom information fields by clicking the **Add custom field** button, clicking the grey custom field label to name the field, and typing a response in the box beside.

CONTACT DETAILS

Here you can record the staff member's address, email and phone numbers. To add more contact details, such as a second email address, click the **Add contact** button.

BANK DETAILS

In this section, you can record the staff member's bank name, sort code and account number.

EMERGENCY CONTACT

Here you can record the telephone numbers and email addresses of the staff member's emergency contact person, for quick reference in case of emergency.

DEPENDANTS

You can record the name, relationship and date of birth of any dependants of the staff member in this section for HR purposes.

HEALTH INFORMATION

Here you can record health information for the staff member relating to disabilities, allergies, medications and special dietary requirements. Where relevant, you can enter any specific details and note the provisions made.

VACCINATIONS

In this section you can record which vaccinations the staff member has had. For the vaccinations that the staff member has had, you can enter the date of the vaccination and any further details.

CHECKS

You can create a custom list of additional HR 'checks' and information that your company may wish to record and report on by going to **Admin > HR** and clicking **HR Custom fields** from the top menu. Then click the **Add field** button. Give the field a title, and specify the response type (yes/no, date field, free-text, drop down box).

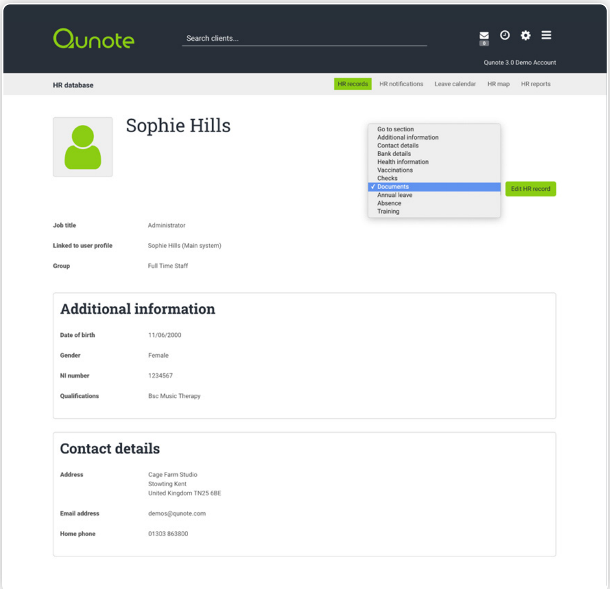
For example: You may wish to create a field to record DBS expiry date. Once completed for each staff member, you can then run a report (see HR Reports section) showing the date when each staff members' DBS certificate expires.

Once you have completed the relevant fields, click **Save HR record** at the bottom of the page. You can update these details at any time by clicking Edit from the drop-down **Actions** menu next to the staff member's HR record.

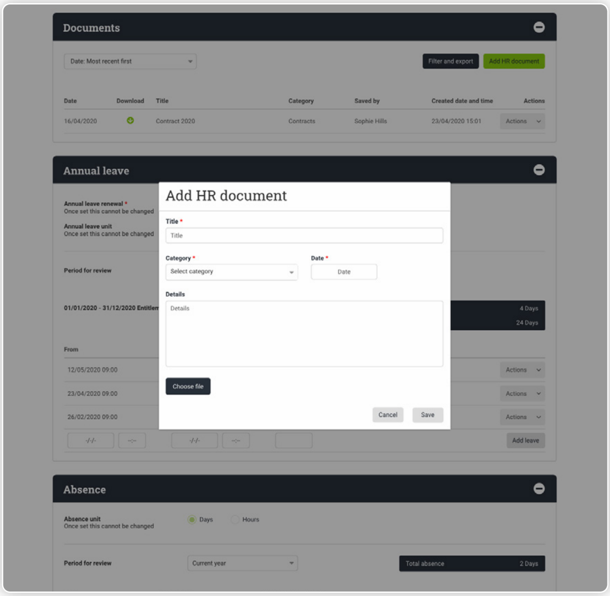
UPLOAD DOCUMENTATION TO AN HR RECORD

Once you have saved a staff member's HR record, you can upload documentation to their record, such as copies of their contract, identification, certificates etc.

To upload a document to a HR record, go to **User section > HR database** and click **View** next to the HR record. You can use the **Go to section** drop-down box on the top-right of the HR record page to quickly navigate to the 'Documents' section of the record.



Click the **Add HR document** button in the documents section. Enter a document title, category and date. Then click the **Choose file** button to browse your device for the document to upload.



Please note: To create HR document categories (such as 'Contracts', 'Certificates' etc.) that will help you filter and export your HR documentation, go to **Admin > HR > Document categories**, then click the **Add document category** button. The document categories you create will apply to all HR records.

RECORD INSTANCES OF ANNUAL LEAVE AND ABSENCE

ANNUAL LEAVE

Click **View** beside a staff member's HR record and navigate to the 'Annual Leave' section.

Before recording annual leave against a staff member's HR record, you will first need to specify the date on which their annual leave allowance period renews, and the unit of their annual leave entitlement (days or hours).

Use the drop-down boxes to specify an Annual leave renewal date. This will allow you to allocate annual leave to different annual leave periods. The earliest period available to select will be the period prior to the period in which the Qunote account was created. The latest period available will be the period after the current annual leave period.

Next select the unit in which annual leave will be recorded – in days or hours. You are able to enter decimals of a day or hour (e.g. 0.5 days). Then set the annual leave entitlement for that staff member, based on the unit chosen. You can specify a different annual leave unit and entitlement amount for each member of staff.

Now you can record instances of annual leave by entering in the dates and times between which annual leave was taken, and manually entering the number of days or hours taken.

The system displays a running total of the amount of annual leave taken, and the total leave remaining, based on the entitlement set for the staff member.

Use the **Actions** menu beside a recorded instance of annual leave to edit or delete that instance.

All instances of annual leave recorded on all HR records will be displayed on the **Leave calendar**.

ABSENCE

Click **View** beside a staff member's HR record and navigate to the Absence section. For each HR record, you can specify the unit in which absence will be recorded- in days or hours. You are able to enter decimals of a day or hour (e.g. 0.5 days). Now you can record instances of absence taken by entering in the dates and times between which the staff member was absent, entering the number of days or hours taken and indicating a reason for absence.

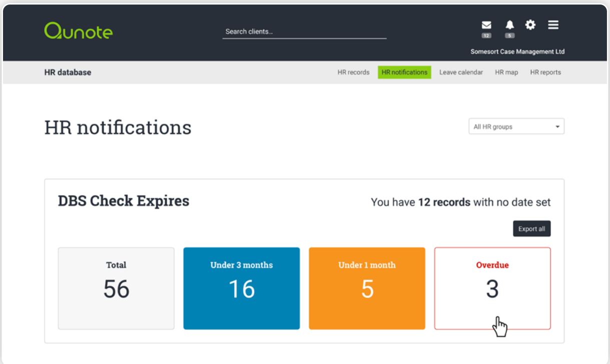
The system displays a running total of absence recorded for that staff member. Use the **Actions** menu beside an instance of absence to edit or delete that instance. All instances of absence recorded on HR records will be displayed on the **Leave calendar**.

LEAVE CALENDAR

The leave calendar displays all instances of annual leave and absence recorded in each HR record on a handy calendar view. To view the Leave Calendar go to **User section > HR database**, then click **Leave calendar** from the top menu. You can click the **Filter** button on the top right of the page if you wish to refine your view by name, staff group, or type of leave (annual, absence, or all). Then click on a day in the calendar to view instances of annual leave and absence recorded for that day, with links to the HR records of the staff members on leave.

HR NOTIFICATIONS

The HR Notifications page helps you stay alert of important dates within your staff records (such as training and DBS expiry dates), helping you keep on top of expiry dates, deadlines and renewals.



To set up a general date field you wish you to monitor across all HR records, go to **Admin section > HR** then select **HR Custom fields** from the top menu. Click the **Add field** button and specify a title for the field. Select 'Date' or 'Tickbox & date' as the field type, set the 'Track date on HR notifications page' option to 'Yes' and click **Save**.

Within each HR record you can then specify the relevant date against this field and go to **User section > HR database > HR notifications** to see a visual indication of the HR records for which this date is upcoming in the next 3 months, one month, or is overdue. Click on a figure to view a list of HR records included in that figure and export to Excel.

HR MAP

To view your staff members on a Google Map (according to the postcode entered in their HR record), go to **User section > HR database**, then select **HR map** from the top menu. You can filter the staff displayed on the map by skills, characteristics, and distance from a client's postcode. This feature will allow you to quickly and easily assign appropriate staff members to a client.

HR REPORTS

To report on key HR metrics across your employees (such as absence and annual leave instances/entitlement, custom HR checks, and upcoming expiry dates for training and DBS) go to **User section > HR database**, then select **HR Reports** from the top toolbar. The reports will be generated based on the information recorded in the HR records. You can print and export these to excel for further analysis.

TRAINING LOGS

Click **View** beside a staff member's HR record and navigate to the Training section of the page.

Here you can record a log of training courses that the staff member has completed, details of their mark/grade and the date on which their training expires. You can report on this training data across all staff members to help you stay informed of any upcoming expiry dates, and ensure that staff members with the required training are matched to clients.

Please note: To add a training course to the drop-down list, go to **Admin > HR** and click **Training** from the top menu. Then click the **Add training** button and fill in the name of the training course, and level if applicable (e.g. First Aid (Basic)).

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