Smartly

Powering your people

People Management

Quick start guide

From setting up new employees, to managing all their information, to sorting their pay and timesheets, our new People Management software lets you do it all in one place, cutting down your workload and freeing up your headspace.

Smartly People Management helps you streamline HR admin, reduce compliance risk, and give employees a great experience – all in one place. It's HR admin that powers your people – not one that slows them down.

Whether you're just getting started or want to unlock more value, this guide will help you get going with People Management.

Contents

What is People Management

People Management provides you with a powerful toolkit to help manage your business and employees. The current feature set includes;

- **Tasks:** Create actions for employees to complete, with visibility to track progress and completion.
- **Automations:** Automatically trigger reminders and tasks based on your configured processes and workflows.
- **Document Storage:** Store documents at both company level and employee level.
- **Training & Compliance:** Track assessments, qualifications, licenses, and certifications to ensure employees remain compliant in their roles.
- **Org Chart:** View the organizational hierarchy and reporting structure across your business.
- **Hiring and Onboarding Candidates:** Manage and offer preferred candidates' roles within your organisation, including issuing contracts for signing through Smartly.
- **Resource Centre:** Access templates, guidance, and legal support for your HR administration needs.

Please note that we are constantly developing each feature to offer more functionality as well as adding new features that help you run your business.

Coming soon: Pay Reviews. Mobile access to Tasks and Files. Policies.

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Getting set up for People Management

To get set up in people management you will need to set up your employees with the correct permissions to use People Management.

You may also have administrators who are not employees who need People Management permissions.

Let's take a look at what this means and the process to set these up.

Understanding user permissions

Note: Some of the features below are only available to users with the right permissions. If you do not have these permissions, seek assistance from your **payroll Main Contact.**

There are four user access levels within People Management:

1. **Master User**
2. **Administrator**
3. **Manager**
4. **Employee**

Master User

This is the highest access level, providing full visibility and access to all People Management features. No additional permissions are required with this role.

Administrator

Administrators have access to certain People Management features that help to better manage the details of employees, such as deeper employee profiles, tasks and automations, and company and employee files. Administrators can be set up to access all employees, or just those in certain pay groups.

Manager

Different types of manager access can be given to enable your managers to use People Management features for direct and indirect reports:

- **View only** allows managers to view basic information about employees including viewing tasks.
- **Line Manager** allows these users to manage employee information as well as assign tasks.
- **Senior Manager** allows users to manage employee information, assign tasks as well as manage hiring and onboarding (including see pay information).

Employee

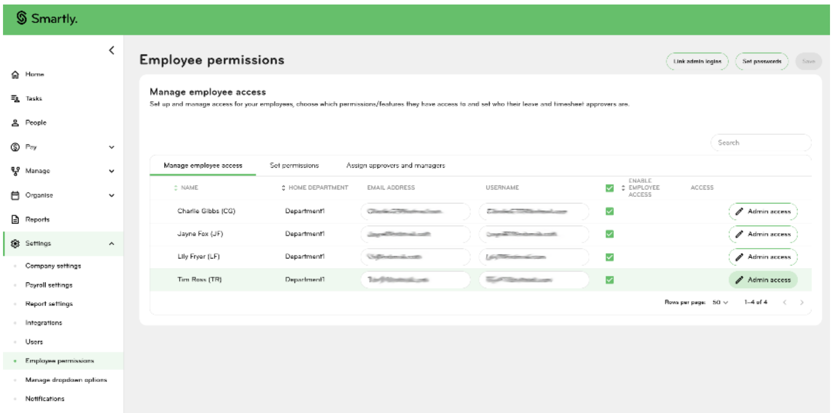
By default, all employees can see their own employee information as well as the company and employee documents shared with them and can complete tasks and automations assigned to them.

Managers and admins are often employees as well as their other user types.

Set up People Management administrators

To create a new admin login **for an employee**,

1. Go to **Settings>Employee permissions**, find the relevant employee and click **Admin access**.



2. Choose the access level you would like the employee to have. E.g. If you want the user to have HR access only, you would toggle on **'Manage people'** and leave the other toggles off.

If you are not sure about the access entails, hover over the little information icon for more information.

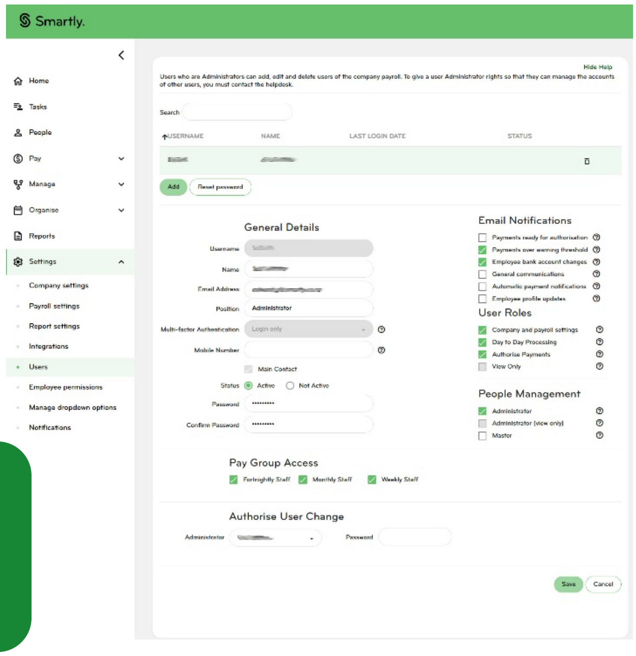
3. After you have entered all the required information, enter your password to authorise the change and click **Save**. You will then see the **Admin** tag next to the selected employee's name.

If the person who you want to create an admin login for is **not an employee** of the company, simply go to:

1. **Settings**, **Users** and **Add**.

We have not changed how a user is created on the **Users** screen. It's the same process. You will simply see an additional pop up asking if this admin access is for an existing employee.

2. Click 'Non-employee'.
3. Add in the required fields such as the **username**, the person's **name**, their **email address** and assign them a **password**.
4. Assign them roles and **permissions** and set which **pay groups** they have access to.
5. Enter your password at the bottom under '**Authorise user change**'.
6. Advise your admin of their username and password.



After logging in, the new admin can change their password by clicking on their initials at the top right of the screen.

Set up managers for People Management

1. Go to **Settings>Employee permissions**.
2. If the employee hasn't had their employee permissions enabled, please enable them first.

Under the **'Manage employee access'** tab, enter their email address, username and tick on 'Enable employee access'.

3. Under the '**Set permissions**' tab, set what permissions you would like them to have.
   - **View only -** Enables them to view the employee details screen for their direct and indirect reports, excluding bank and tax details.
   - **Line manager -** Enables them to edit the employee details screen for their direct and indirect reports, excluding bank and tax details. Also allows them to create and assign tasks.
   - **Senior Manager -** All the permissions of a line manager, plus access to Hiring. A Senior Manager can initiate the hiring process, see pay information and, select and onboard new employees.
4. Under the '**Assign approvers and managers'** tab, assign employees to this user.

   Please note: The leave approver, timesheet approver and manager for an employee can be the same person or different people.
5. Click **Save** to save your changes.
6. To activate a user for self-service for the first time, click **Set password**, then select the employee from the pop-up list. Selected employees will be sent a link to create a password. You will need to advise the employee of their username.

Set up your employees for People Management

All employees will have 'Employee' user level People Management permissions by default. This allows them to review documents shared with them and complete tasks and automations assigned to them.

If you need help setting up your people as employees, see the **New employees article** which will help you set up their payroll permissions including, leave and timesheet approvers, manager.

Updating your employee profiles to get the most from People Management

People Management gives you deeper options for recording employee data in Smartly, with additional fields and better ways to use existing data. To get the most out of your People Management subscription, be sure to update these parts of the profile for your employees.

Employee Files

People Management gives each employee their own cloud storage system, where you can upload files and documents that relate to an employee. This is a great place to store any documentation related to an employee, including:

- Employment contracts
- Variation letters
- Job descriptions
- Completed tax and KiwiSaver forms
- Proof of identity
- Copies of licences and certificates

Training and compliance records

With People Management enabled, you'll see the Training and compliance section on each employee's **Employment tab**.

You can use this section to assign **Assessments, Qualifications and Licences and certifications** to your employees.

Having this information up to date in Smartly for your employees makes compliance much easier to track, especially for expiring licences and certifications.

Bulk uploading records

These can be added manually to each employee, or you can use the Bulk actions tool to complete a simple spreadsheet and upload records in bulk. To do this,

1. Click **Manage>Bulk actions**.
2. Select **Employee records>Import records**.
3. Then click **Download template** and open the downloaded file.
4. Fill in the spreadsheet with the training records y ou wish to import,
5. **Save** your changes,
6. Then select your saved file for importing.

When completing the spreadsheet, take care to match employee names and dropdown options exactly.

Other employee data

People Management takes existing employee data and uses it in new ways, so you'll want to make sure you have everything filled in for your employees. In particular:

> **Manager:** If you've set up managers to have access to Smartly via the Line Manager or Senior Manager roles, it's important that employees are set up with the correct reporting relationship. You can set an individual employee's manager on the Employment tab of their profile or manage reporting lines in bulk in **Settings>Employee permissions**.
>
> **Team:** Teams are useful filters for People Management reports, so if you've set up Teams in your dropdown options, make sure each employee is assigned to a team in their **People>'Employee Profile'>Employment tab**.

Manager and **Team** categories are also used to display your company's Org Chart. Click on **People>Org Chart** to view a visual display of your company's reporting lines and teams. This is a great way to ensure that everybody has been correctly updated.

Personal Identification

If you collect passport or driver's licence data from your employees, you can record this in People>'Employee profile'>Personal and store images in Employee Files as well.

You can also record an employee's work eligibility. If you have employees with a work visa, it's important to store the visa type and expiry date. With this filled in, you can use the Visa expirations report to view all visa data and also create an Automation to set reminders and create tasks when visas are approaching expiry.

Company files is a handy place to keep all your documents and policies in one centralised place.

One of the first steps of streamlining your people management processes is to get all your important company information into one place. You can upload any document you like, including those that you'd like to share with multiple employees.

Files that are specific to a particular employee, such as a person's contract or job description, can be stored in **Company files**.

Note. Admins and managers will need to be set up with the correct permissions to manage company files.

Uploading your company files to the platform has many benefits, such as:

- having all your information in one place,
- making it easy to share and manage files,
- saving time and hassle, and
- giving you peace of mind that your data is secure.

You can organise your files effectively by categorising them, and control who can access them by utilising the permissions function.

Upload, preview, download or delete files

To **upload** a file to Company files:

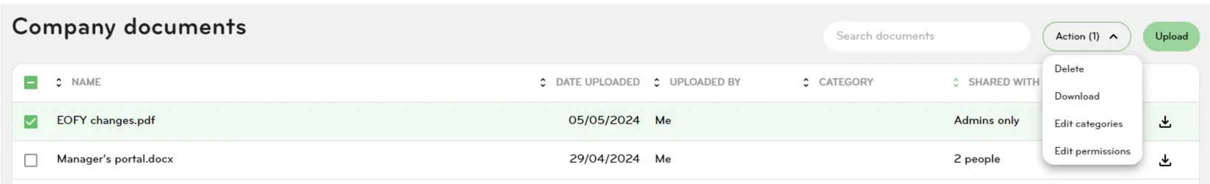
1. Click Manage>Company files and select Upload.

2. You can upload files from your computer, or drag and drop up to 10 files at a time. Each file must be no bigger than 35MB.

Accepted file types:

- PDF
- JPG
- JPEG
- PNG
- DOC
- DOCX
- XLS
- XLSX
- CSV
- PPTX
- PPT

3. Once your files are successfully uploaded, you will see an 'Upload successful' message. You can choose to upload more files or click Done.



Make sure your file is named clearly and logically before you upload it.

If you're getting started with People Management it can be really helpful to upload and organise all of your company files at the same time.

To **preview** a file (PDF and image files only):

Select the file you wish to preview and click on the eye icon. If the icon is grey, this means the preview function is not available for that file.

**The preview feature is currently only available for PDFs and image files.

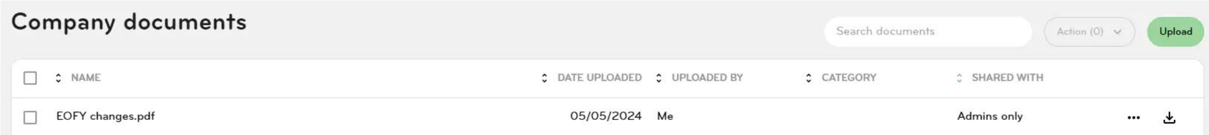
To **download** a file:

Click on the download arrow next to the file.

If you'd like to do a bulk download of files, select the files you need, click Action and then Download.

To **delete** a file:

Select the files you want to delete, click Action and then Delete.



To **search** for a file

The search function allows you to search by name, category, or by the file type, e.g. PDF.

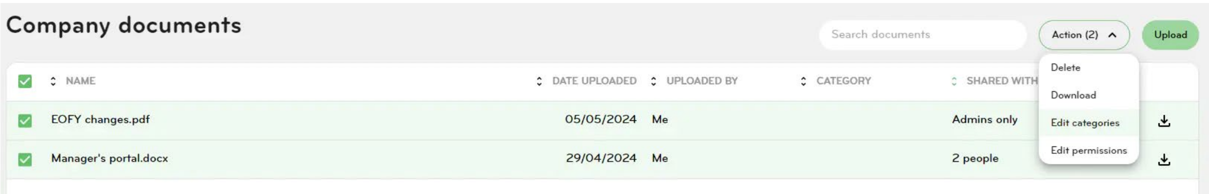
You can also filter your view of company files by category, user who uploaded, or file type.

Or you can sort the list view using the search tools to sort your list by:

- Name
- Date uploaded (Default view Newest)
- Uploaded by
- Category
- Shared with

To edit a file category

To edit the category a file has been filed under, select the files in **Company files** and then click **Action>Edit categories**.

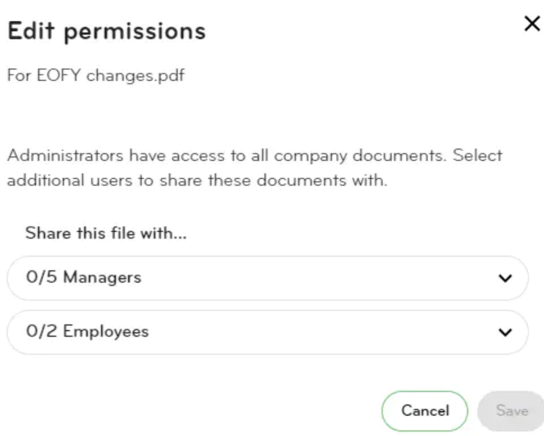


Choose an existing category or click **+ Create new category** if you'd like a new file category.

To **edit sharing permissions**

To share a document with your employees,

1. Go to **Company files** then click the ellipsis (...) menu for the file you wish to share, then click **Edit permissions**.
2. You can choose to share with all managers and/or employees or choose specific employees.
3. Click **Save** once you have chosen who you'd like to share the files with.



If you wish to share multiple files at once to the same group of employees, use the checkboxes to select all files you wish to share, then click **Action>Edit permissions**. You can choose the managers and/or employees in the same way as above.

Set up your training and compliance records

Dropdown options are expandable lists that can be associated with employees to help link specific employment information with your employees including;

- Position
- Team
- Assessment
- Qualification
- Licence and certification

You can edit, delete and add dropdown options which appear in your employee's **People > Employment** tab.

You will find the **Manage dropdown options** tab under **Settings** on the left hand menu.

Position - In People Management, every employee needs a position title. By standardising position titles, you can group employees together across different managers and teams based on position title. This is especially useful when bulk assigning a task or list of tasks to all employees who share the same position. Adding your common position titles as dropdown options makes it easy to keep these organised.

Team - Teams are a flexible, optional way to group employees. You can choose how to organise teams to fit your business. It could be by function, department, location or whatever else makes sense. Teams are especially useful for running targeted People Management reports, as each report can be filtered to selected teams.

Training and compliance lists

There are three different kinds of training and compliance records you can customise to fit your needs.

Assessment - An assessment has a name, a date, and an optional result. Use assessments to track things that your employees will be assessed on at particular times, and that you want to record the result of. Result options are also fully customisable, such as Pass/Fail, a letter grade, or whatever else fits for the particular assessment.

Qualification - A qualification has a name, a status, and a date. You can add qualifications that are relevant to your business as dropdown options, and then track which employees have the qualification, or are working towards it. The default statuses of qualifications are Enrolment pending, Enrolled, and Graduated, but you can add your own custom states too.

Licence and certification

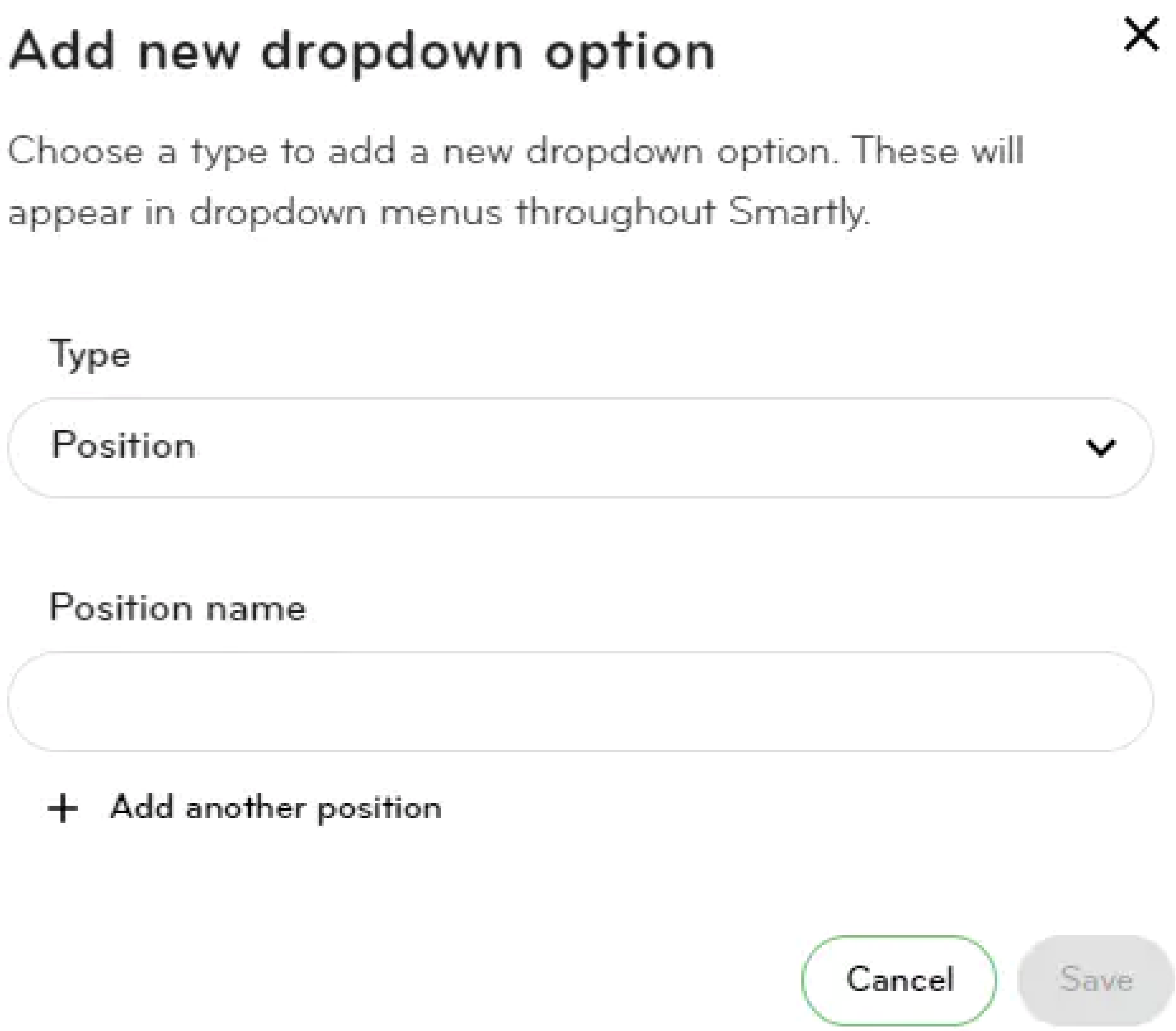
A licence/certification has a name, an expiry date, and an optional reference field. Licences and certifications can be used to track compliance with requirements to keep a licence current, such as a first aid certificate, a safety certificate, or any other training that can expire. Set up your dropdown options with any expirable licences and certifications you wish to track, and then use

Automations and the Expiring licences and certifications report to ensure you never miss an expiry date.

You can set these categories up prior to starting to use People Management, or at any time if a new option is required.

Adding dropdown options

1. To add a new dropdown option, click **+Add new option** in the top right corner.
2. Choose the option type: Position, Teams, Assessments, Qualifications, Licenses & certifications.
3. Add a description under this type, eg. Position, Growth Marketing.
4. You can bulk add descriptions to this type by clicking ‘Add another [X]’.
5. Enter your new description(s), and then click **Save**.
6. To assign the new dropdown option to employees, you will need to do it under the **Employment** section.



New dropdown options can also be added when using them in your employee profiles, so don't worry if you don't get everything to begin with, or need to add new options later.

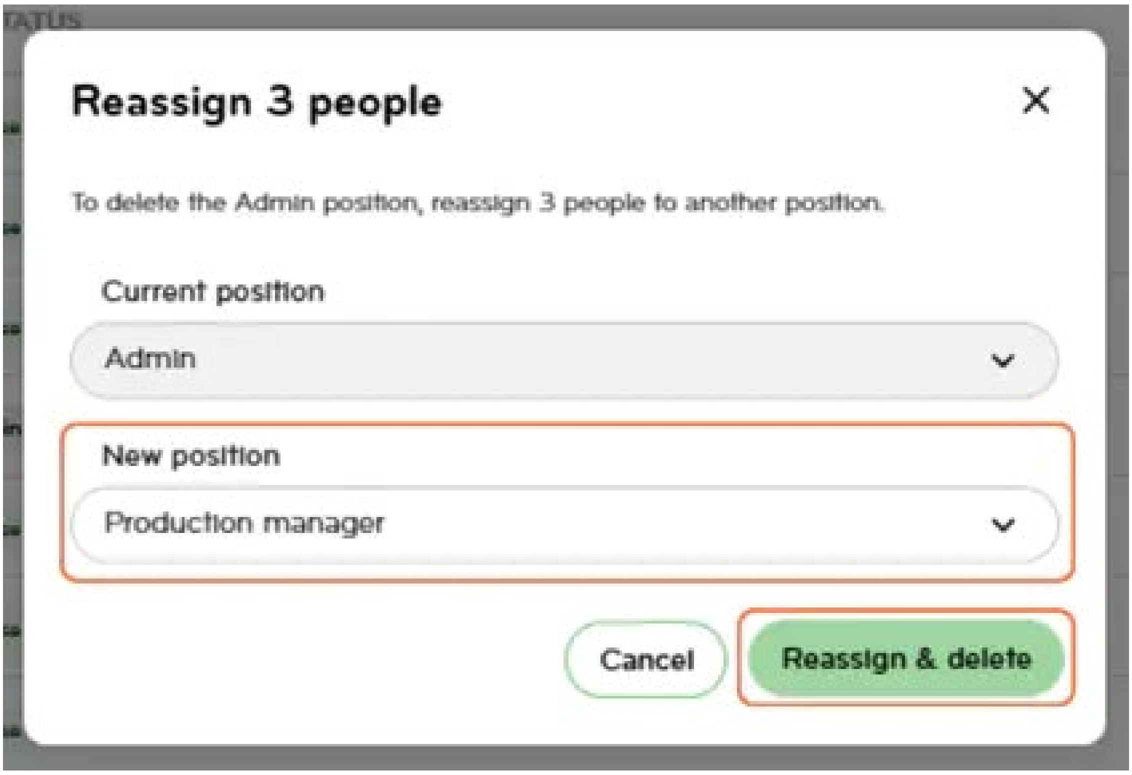
Editing dropdown options

To edit the dropdown option, click the edit pencil icon, rename the option, then click **Save**.

Note: This will rename the option for all your employees.

Deleting dropdown options

1. To delete a 'Not in use' dropdown option, click the trash bin icon, and then click **Delete** to confirm.
2. To delete an 'In use' dropdown option, click the trash bin icon, you will then be asked to reassign any employees who are assigned to this position.
3. Select the 'New position' you want to assign to these employees and then click **Reassign & delete** to confirm.



Next steps

See the information about **People Management on Help Centre**

Visit the **Resource Centre**, a hub of employment related templates, checklists and guides. From warning letter examples, to expense policies, to guides for having difficult conversations with employees, and more. Get expert, up-to-date information when you need it.

Read the guide to **Managing employee records**

Read the **Work hub for managers guide**

Read the guide to **Managing tasks**

Read the guide to **Reporting**

Read the **Hiring guide**

Read the **Onboarding guide**

Or **contact us** for any other questions. We love making the complex simple for you.

We're here To help

Whether you're after some information, or you've got something niggly or urgent that you want to chat through with an expert – we've got you! Our customer support team can be reached on 0800 10 10 38, Monday to Friday, excluding public holidays.

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