Advanced ConnectHR Help Guide

ConnectHR Help Guide

Your guide for working with ConnectHR

by GDC Integration, Inc.

ConnectHR Help Guide

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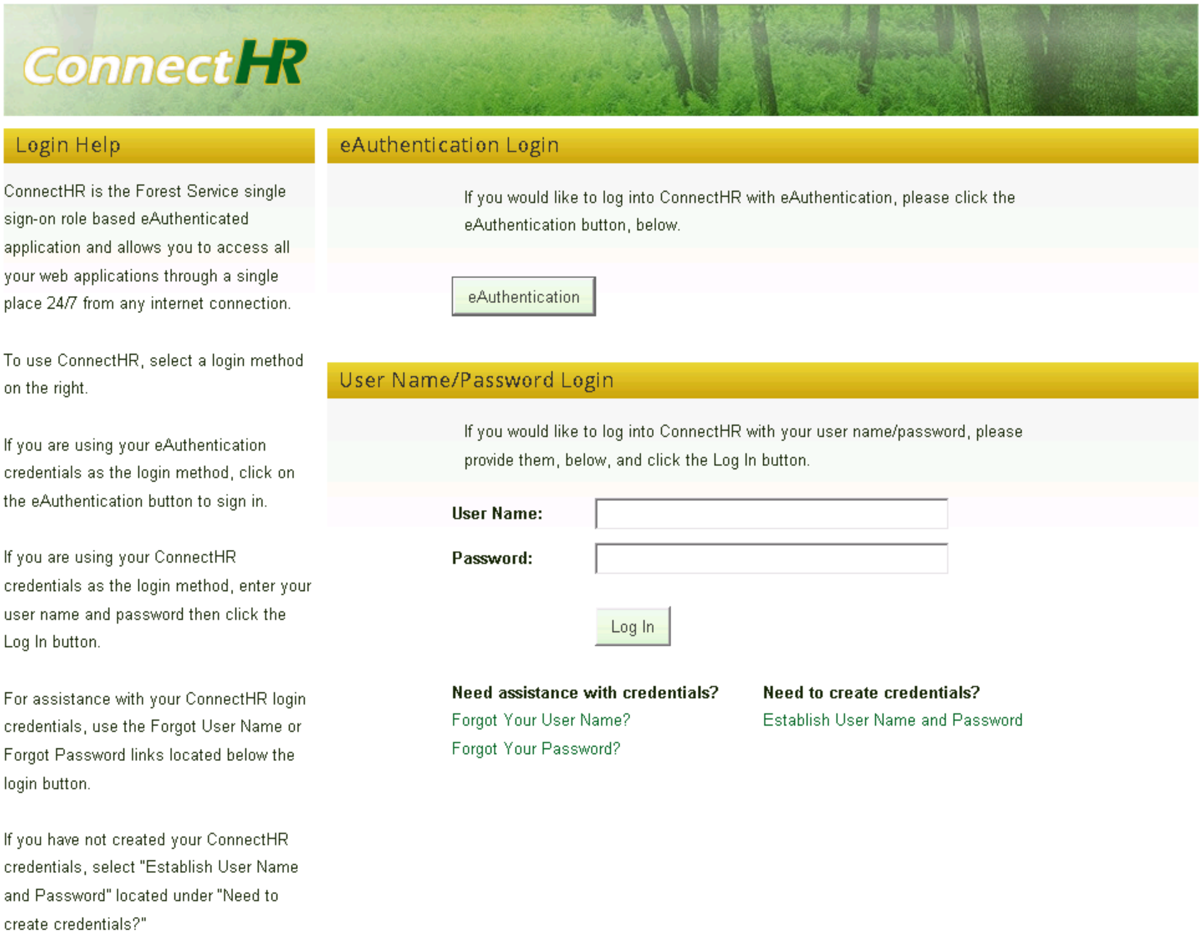
1 Logging In

Your login screen will look like the screen shot below. You will have your navigational bar on the left and your login area on the right.

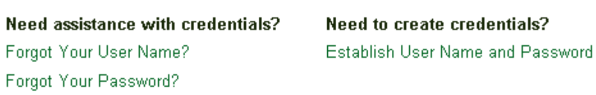


There are two Methods to login to ConnectHR.

You have the ability to login in using your eAuthentication credentials. See the eAuthentication section for more information.

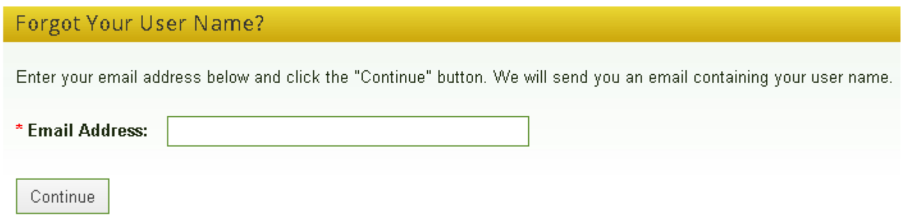
You also have the ability to login by entering the User Name and Password you created, were given or were assigned, then click the "Log in" button.

If you have trouble logging in, you can select the "Forgot Your User Name?" or "Forgot Your Password?" links at the bottom of the screen for assistance. If you are unable to retrieve your login information please contact your HR Support helpdesk.

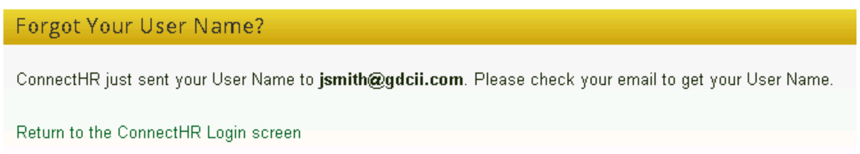


1.1 Forgot User Name

If you forgot your User Name, click on the “Forgot Your User Name?” link on the left navigational bar. You will see a screen asking for your email address associated with your ConnectHR account. Enter your email address and click the "Continue" button and. Your username will be sent to your email address.

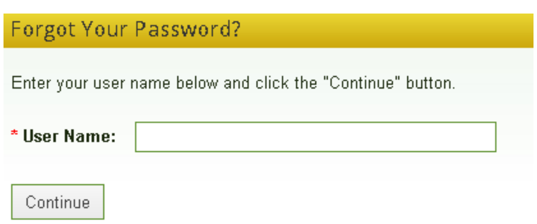


You will receive a confirmation page letting you know your request was submitted successfully.

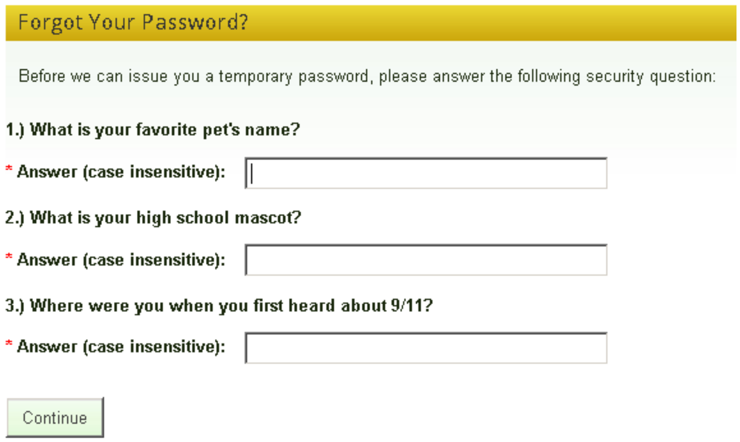


1.2 Forgot Password

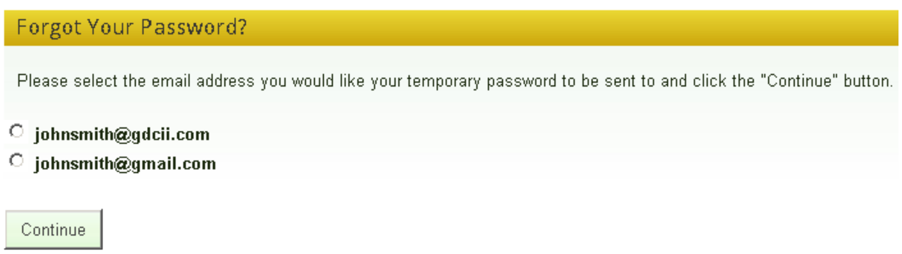
If you forgot your password, Click on the "Forgot Your Password?" link on the left navigational bar. You will see a screen asking for your User Name. Enter your user name and click the "Continue" button.



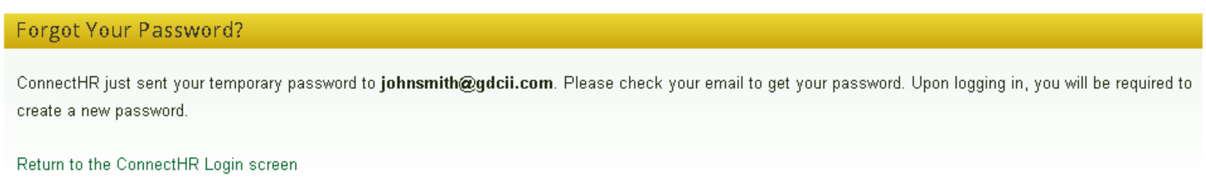
At the next screen you will be asked to answer your security question. Type the answer to your security question in the text box and click the "Continue" button.



After answering your security question, you will be asked to select the email address you would like your temporary password to be sent to. Select the email address and click the "Continue" button.

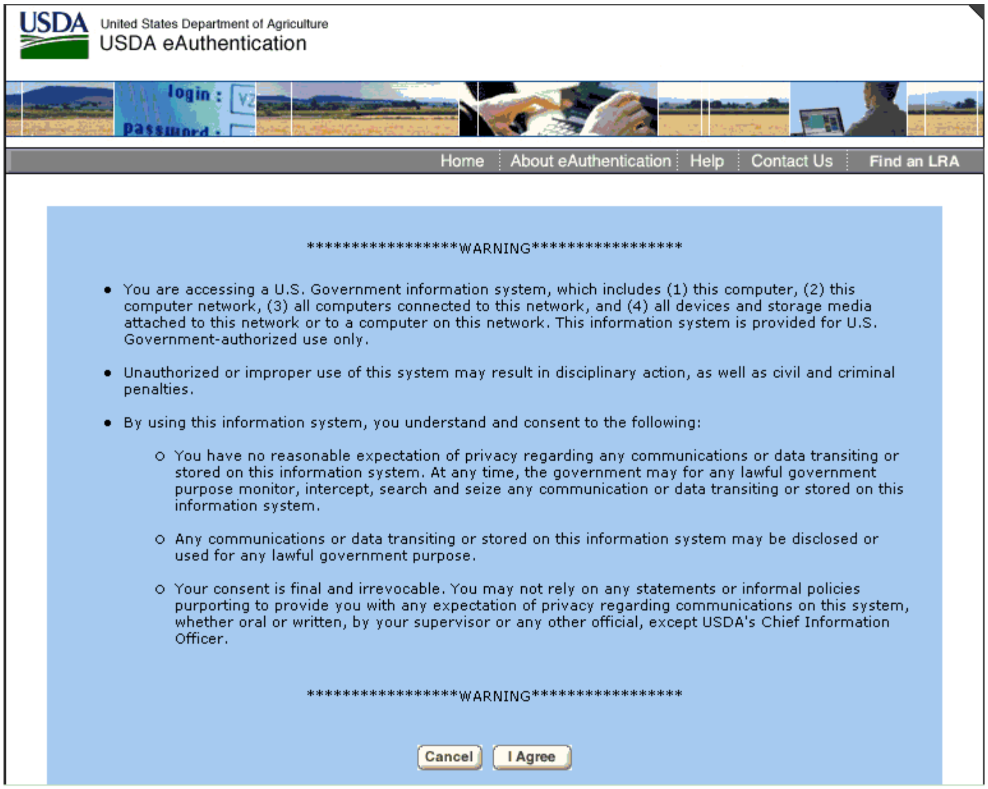


You will see a confirmation page that will inform you that your temporary password will be sent to the email address that was previously selected. You can click the "Login screen" link to return to the login page, and you will login with the new password that is sent to your email address.

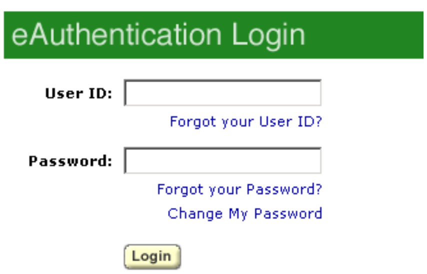


1.3 eAuthentication

You have the option to log in to ConnectHR using the USDA eAuthentication system. You first have your eAuthentication credentials established to use this method. The eAuthentication begins with the federal warning screen and proceeds to the identification and password screen.Click on the Continue button to get a screen to enter the eAuthentication User ID and Password.



Enter your User ID and Password and click the Login button to be eAuthenticated. You may also chose to change your eAuthentication password, to reset your forgotten password, or to retrieve a forgotten User ID.



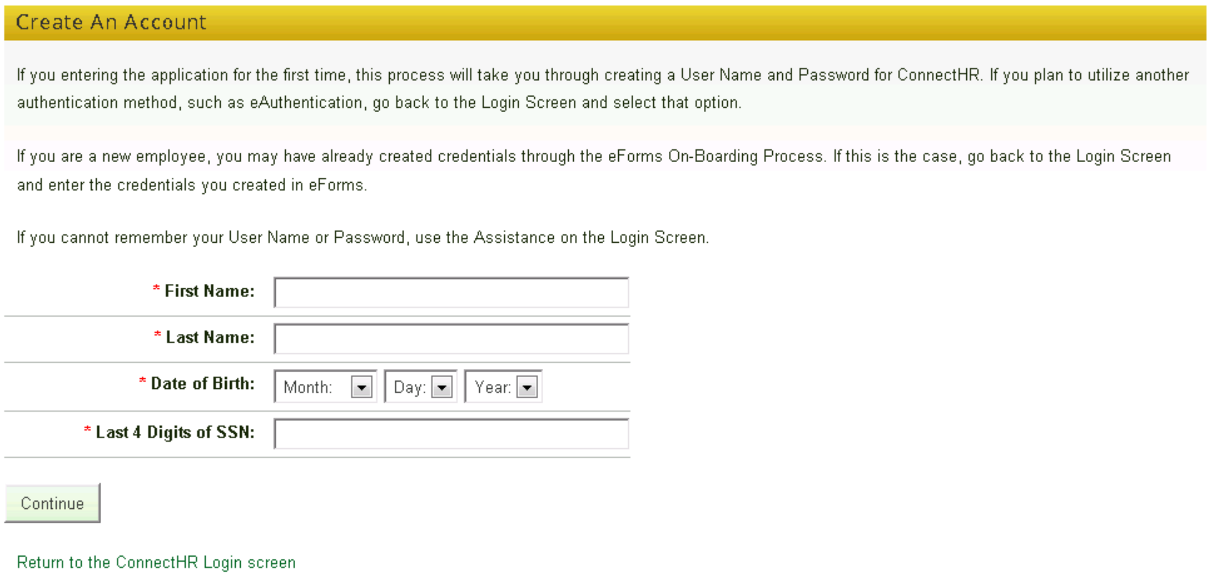
2 Creating An Account

If you are entering the ConnectHR application for the first time, click on the "Create An Account" link on the left navigation bar. This process will take you through creating a User Name and Password.

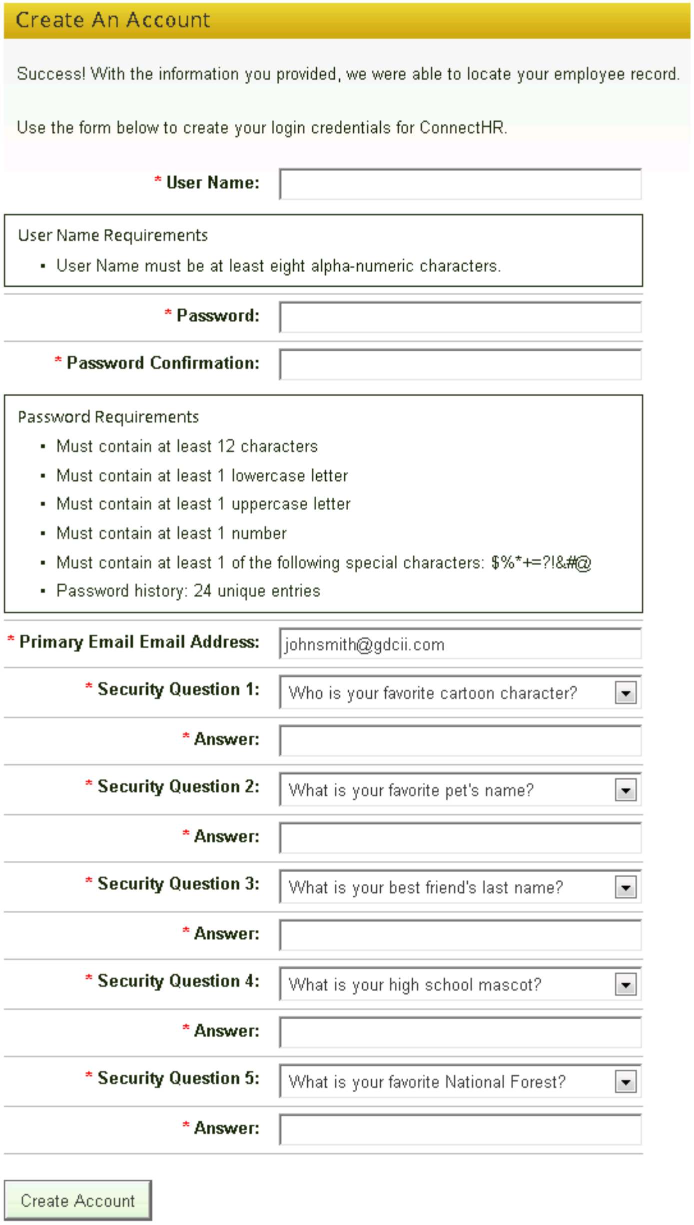
NOTE: You will only be able to create an account if you have an employee

record in the system.

Enter your First and Last name, Date of Birth, and the last 4 of your Social Security Number. Then click the "Continue" button.



The next screen will ask you to complete the creation of your account. Here you will enter a User Name, Password, Email Address, and select your security questions. Your password will have to follow the criteria listed on the page in order for you to continue to the next page.


Create An Account

Success! With the information you provided, we were able to locate your employee record.

Use the form below to create your login credentials for ConnectHR.

* User Name:

User Name Requirements
- User Name must be at least eight alpha-numeric characters.

* Password:

* Password Confirmation:

Password Requirements
- Must contain at least 12 characters
- Must contain at least 1 lowercase letter
- Must contain at least 1 uppercase letter
- Must contain at least 1 number
- Must contain at least 1 of the following special characters: $%*+=?!&#@
- Password history: 24 unique entries

* Primary Email Email Address: johnsmith@gdcii.com

* Security Question 1: Who is your favorite cartoon character?

* Answer:

* Security Question 2: What is your favorite pet's name?

* Answer:

* Security Question 3: What is your best friend's last name?

* Answer:

* Security Question 4: What is your high school mascot?

* Answer:

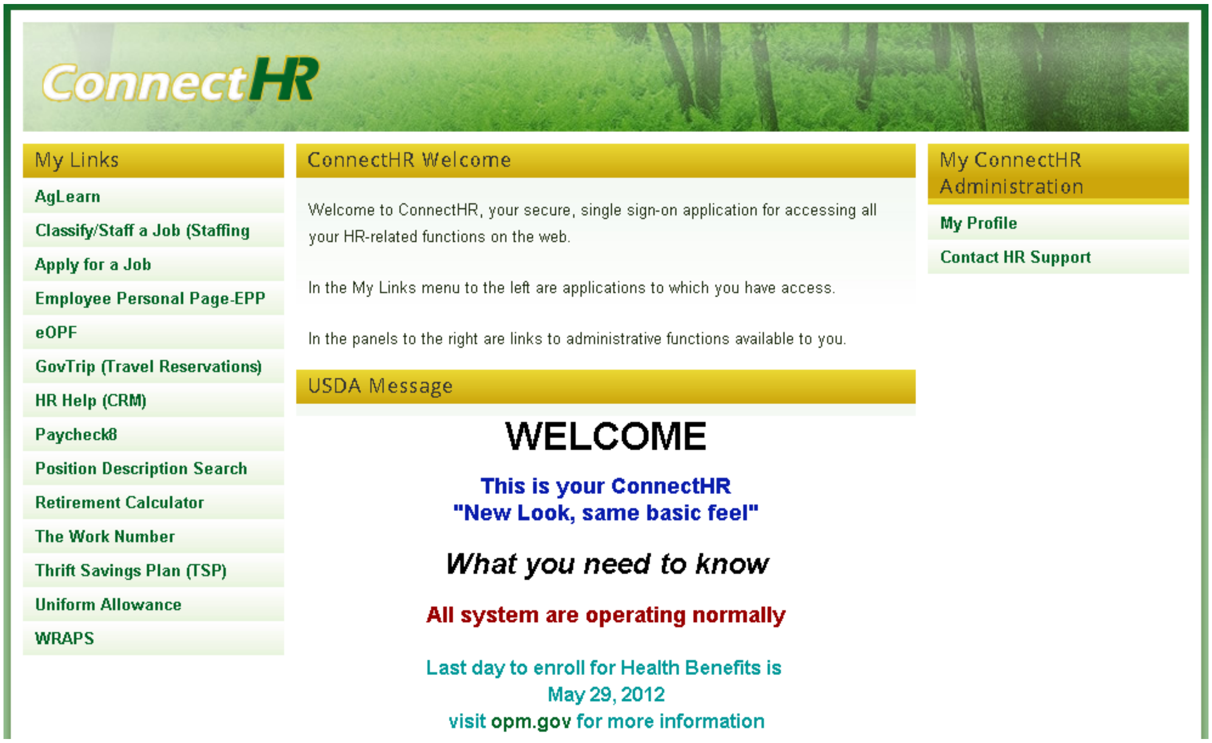
* Security Question 5: What is your favorite National Forest?

* Answer:

Create Account

3 Home Screen

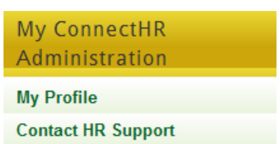
Your home screen will consist of a left, and right navigation bar and your content area which will contain a welcome message and have a USDA Forest Service Message. The left navigation bar will contain links to the applications you use every day such as Paycheck8 or eForms. The right navigation bar will contain your options for the current screen you are in. These options can change depending on the different menus you click on. Your basic options are to manage your ConnectHR profile, Manage Employees, Manage Links, Manage Roles, Manage Office Admins, Manage My Organization, and Contact Support, and View Reports.



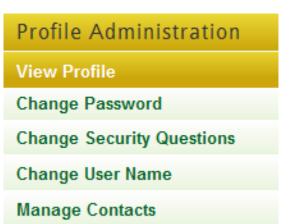
NOTE: Available options will be based on user role and access.

3.1 My Profile

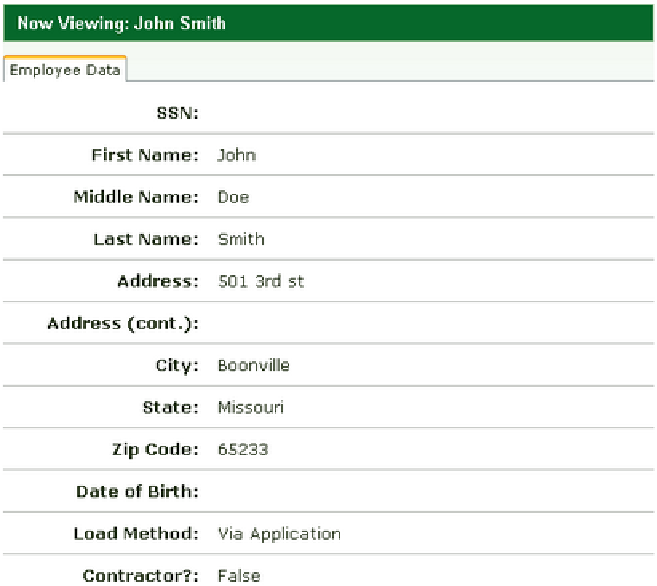
The Profile area is where you can view your current profile information and edit it if necessary.
The “My Profile” link is located on the right navigational bar.



Clicking on it will allow you to edit your profile information.



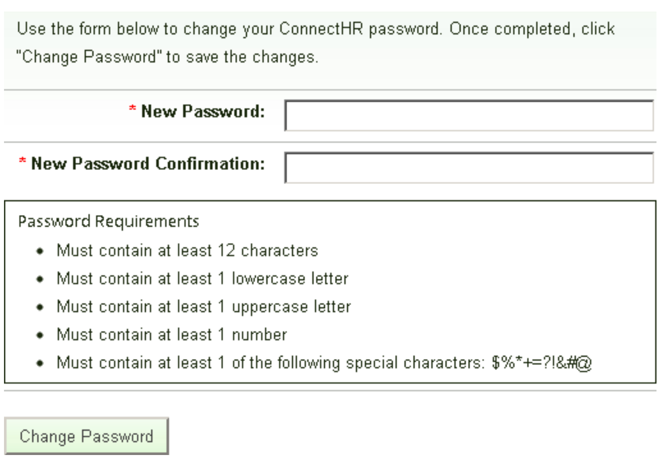
You will have 3 tabs on the main content area of your My Profile page. The first tab will be have your basic employee information, Name, Address, SSN, and Date of Birth.



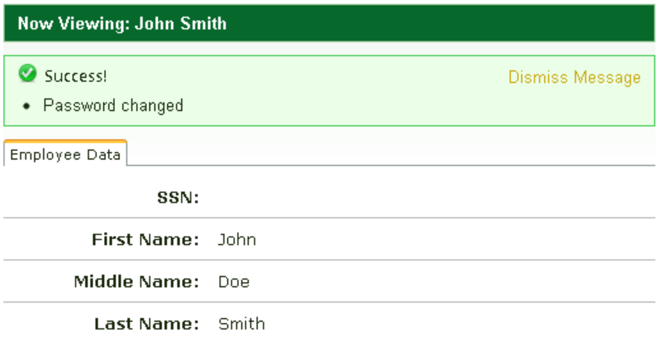
3.1.1 Change Password

From here you can change your password at anytime. Simply enter your current password first followed by your new password, and confirming your new password so you know you entered everything correctly.

Be sure that your new password meet the password requirements.



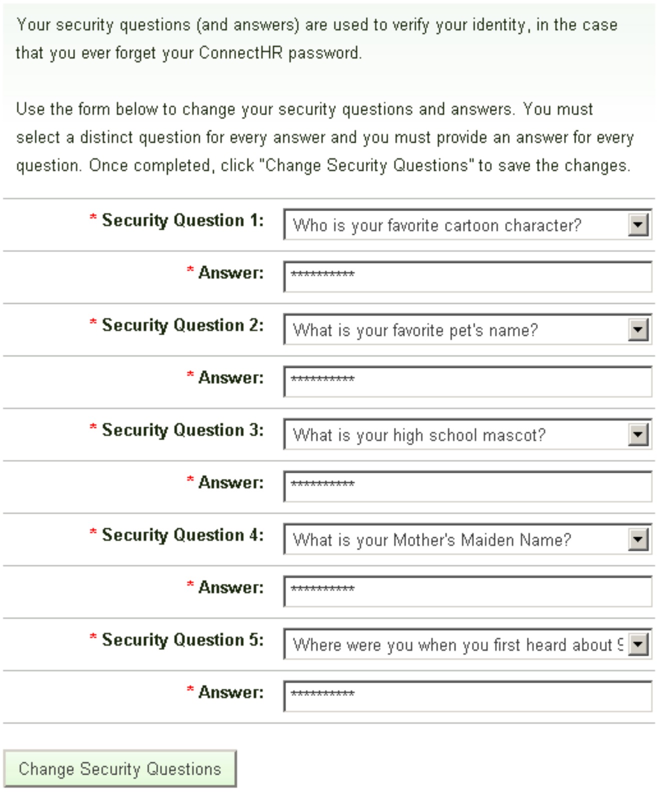
After entering all the required information, click the "Change Password" Button. You will be taken back to the employee data screen and receive a confirmation message that your new password has been saved.



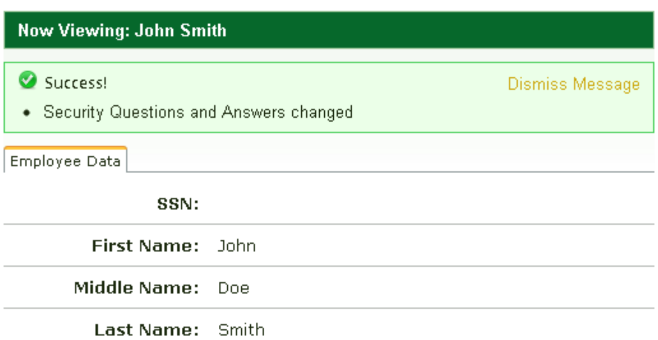
3.1.2 Change Security Questions

You can change your security by clicking on the "Change Security Questions" link on the right navigational bar. You will have to enter your current password in the "Your Password" box in order to save your changes.

NOTE: If you only want to change one or two questions, you will still need to select and answer the question you will want to stay the same. All fields are required to save any changes.



After entering all the required information, click the "Change Security Question" button. You will be taken back to the employee data screen and receive a confirmation message that your security question changes have been saved.

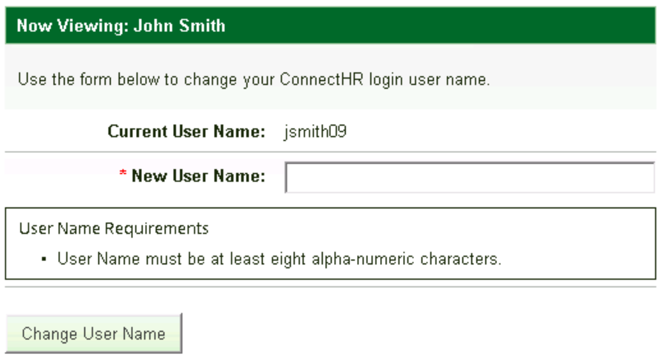


3.1.3 Change User Name

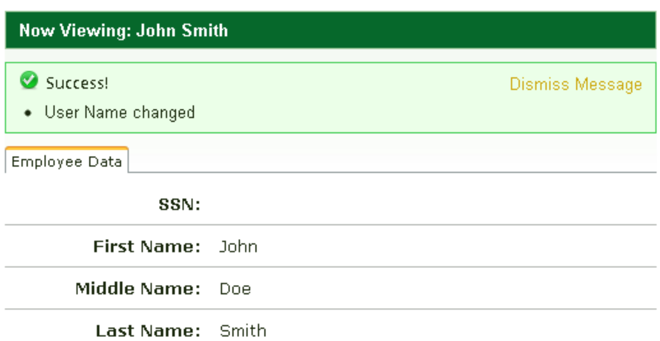
You can change your User Name by clicking on the "My Profile" link on the right navigation bar. Then click on the "Change User Name" link.

From this screen you can change your User Name at anytime, simply create a new user you would like to use. ConnectHR will validate your User Name to check if anyone is currently using that user name. If so, you will receive an error message informing you the user name you have requested already exists. You must then create a new User name not already in use.

Save your changes by clicking on "Change User Name" button.



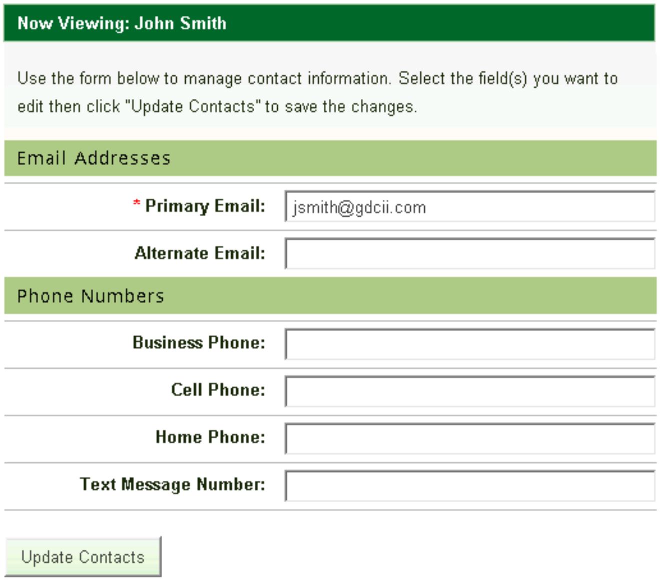
After clicking the "Change User Name" button, you will be taken back to the Employee Data page and given an confirmation message letting you know that your new user name was saved successfully.



3.1.4 Manage Contacts

You can update your contact email information by clicking “My Profile” link on the right navigation bar. Then click on the “Manage Contacts” link. Update either email address and click the "Update Contacts" button. A Primary Email address is required to be entered. Your business email is the preferred one to be entered as primary.
Save your changes by clicking on the “Update Contacts” button.

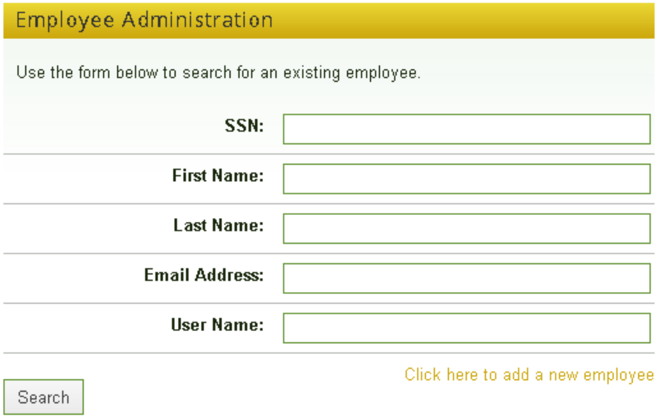
NOTE: Available options will be based on user role and access. Some users may see additional fields to add and update phone numbers, (option available only to select group at this time).



You will be taken back to the employee data screen and receive a confirmation message that your email changes have been saved.

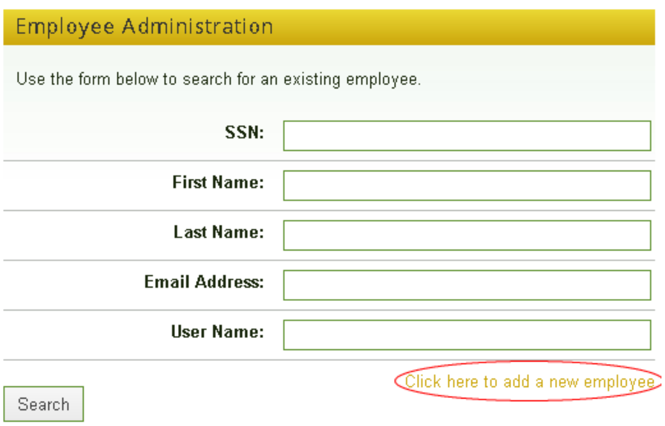
3.2 Manage Employees

Users that have the ability, can manage employee accounts and add new employees. This can be done from the Manage Employees screen by clicking on the "Manage Employees" link found in the right navigational bar.

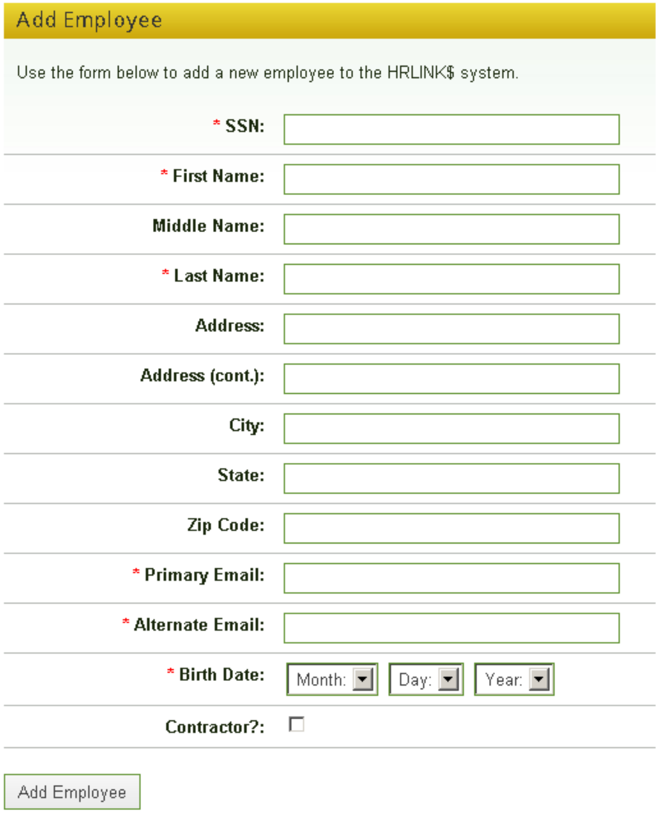


3.2.1 Add New Employee

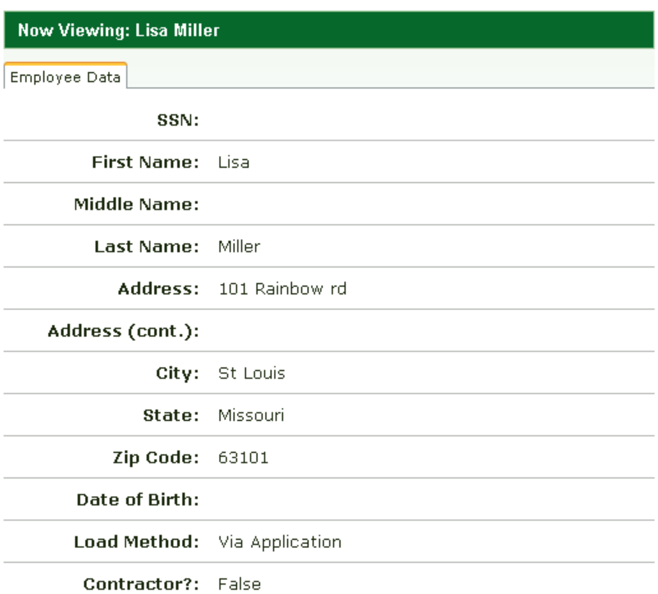
To add a new employee, click on the link at the bottom of the employee search section that says, "Click here to add a new employee"



To create a new user you will have to fill out all the required information. After all the required information is entered, click the "Add Employee" button.

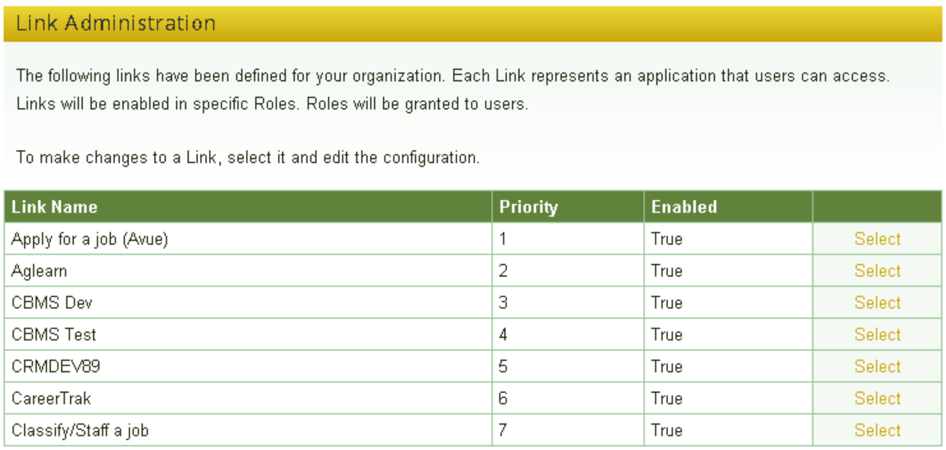


The new employee is now created. You will be taken to the Employee Data screen where you will see all the employees information as a read only form.



3.3 Manage Links

The "Manage Links" section allows you to view or update the links that are found in the left navigational bar. Click on the "Select" link in the same row as the link you wish to view or edit.


Link Administration

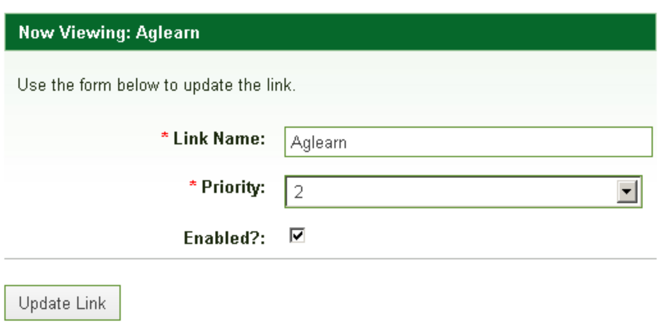
The following links have been defined for your organization. Each Link represents an application that users can access. Links will be enabled in specific Roles. Roles will be granted to users.

To make changes to a Link, select it and edit the configuration.

Link Name	Priority	Enabled	
Apply for a job (Avue)	1	True	Select
Aglearn	2	True	Select
CBMS Dev	3	True	Select
CBMS Test	4	True	Select
CRMDEV89	5	True	Select
CareerTrak	6	True	Select
Classify/Staff a job	7	True	Select

You will be taken to the Link Data tab where you will view the properties of the link you selected.

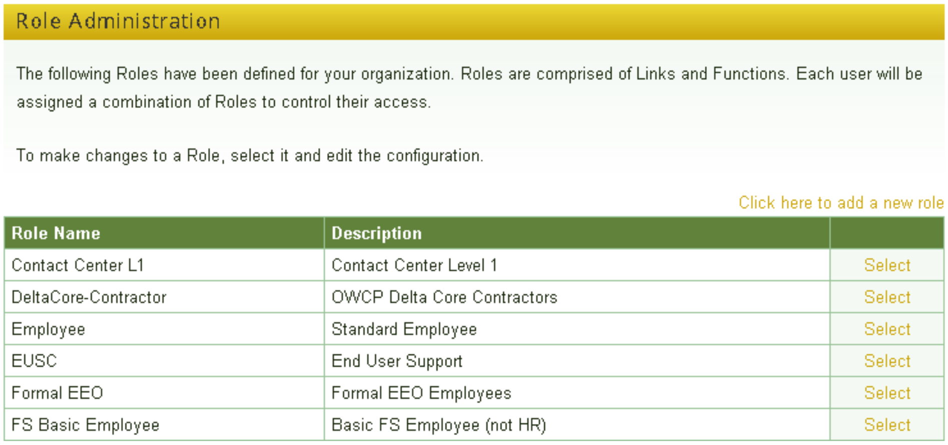
To update the link, click on "Update Link" in the right navigational bar.



From here you can update the link name, priority, and if it is enabled or not. Click the "Update Link" button to save your changes.
Click on "Return to Links" in the right navigational bar to return to the manage links screen.

3.4 Manage Roles

To create or edit the privileges of ConnectHR users, click on "Manage Roles" in the right navigational bar. On the page you will see all the different roles with in ConnectHR. Click on the "Select" link to view the properties of the selected role.


Role Administration

The following Roles have been defined for your organization. Roles are comprised of Links and Functions. Each user will be assigned a combination of Roles to control their access.

To make changes to a Role, select it and edit the configuration.

Click here to add a new role

Role Name	Description	
Contact Center L1	Contact Center Level 1	Select
DeltaCore-Contractor	OWCP Delta Core Contractors	Select
Employee	Standard Employee	Select
EUSC	End User Support	Select
Formal EEO	Formal EEO Employees	Select
FS Basic Employee	Basic FS Employee (not HR)	Select

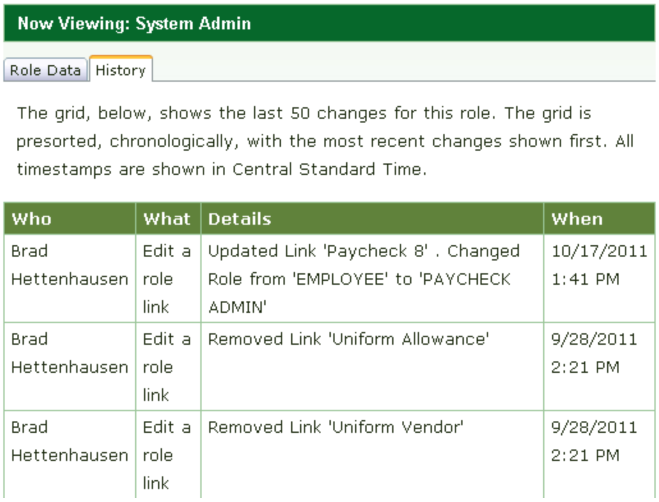
Role data shows you the name, description, and tier number of the role you selected. It will also show you when the role was created, who it was created by, and the date it was last modified and who it was modified by.


Now Viewing: System Admin

Role Data | History

Role Name:	System Admin
Description:	The Highest level Administartor
Tier Number:	10
Created On:	9/20/2011 10:42:36 AM
Created By:	
Last Modified On:	9/28/2011 2:21:03 PM
Last Modified By:	Brad Hettenhausen

On the History tab, you will be able to see the history of changes made to that role.



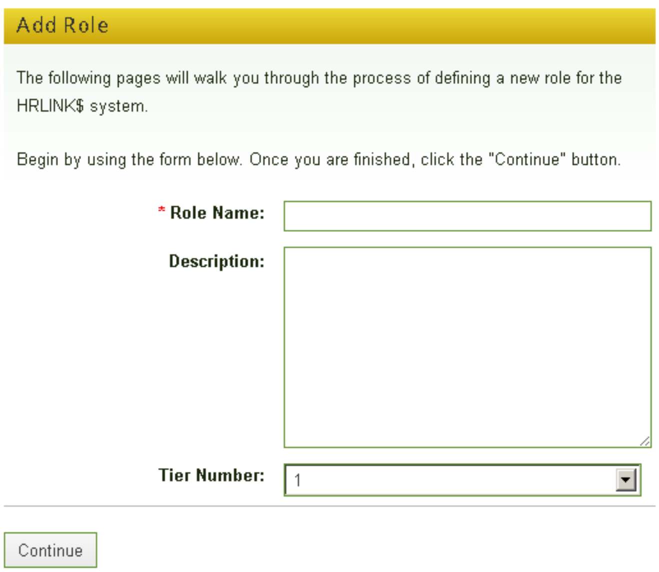
On the right navigational bar you have options to update the properties of that role.

For more information on updating role properties please see Update Role, Edit Role Links, and Edit Role Functions.
You can click on "Return to Roles" to get back to the Manage Roles home screen.

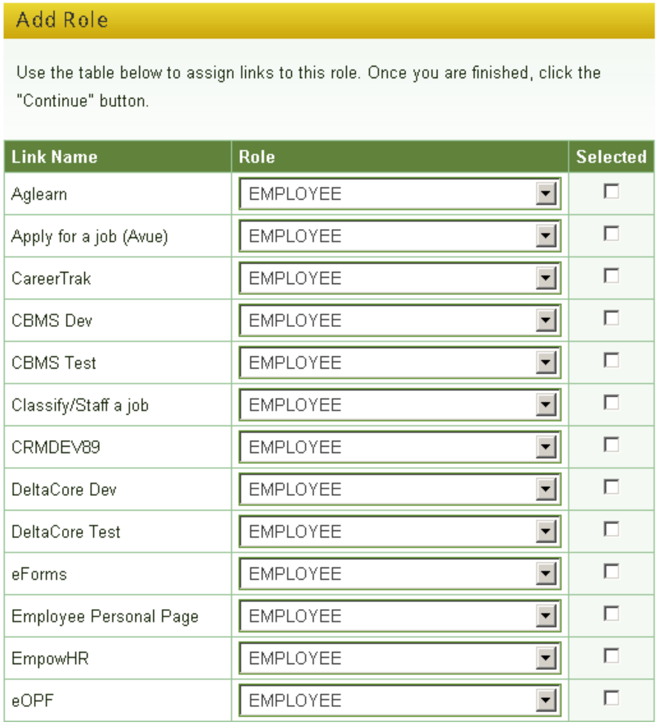
3.4.1 Add New Role

To add a new role, click on the link on the top right side of the role table.

You will first be asked to name, describe, and tier number for the role you are about to create. Click the "Continue" button to save the information you have entered and move to the next step.



Here you will select what links are visible in the left navigational bar for this role. Add a check mark in the "Selected" column next to the link, and select the role that will be associated with this link. After you have finished making your selections, click on the "Continue" button to proceed to the next step.

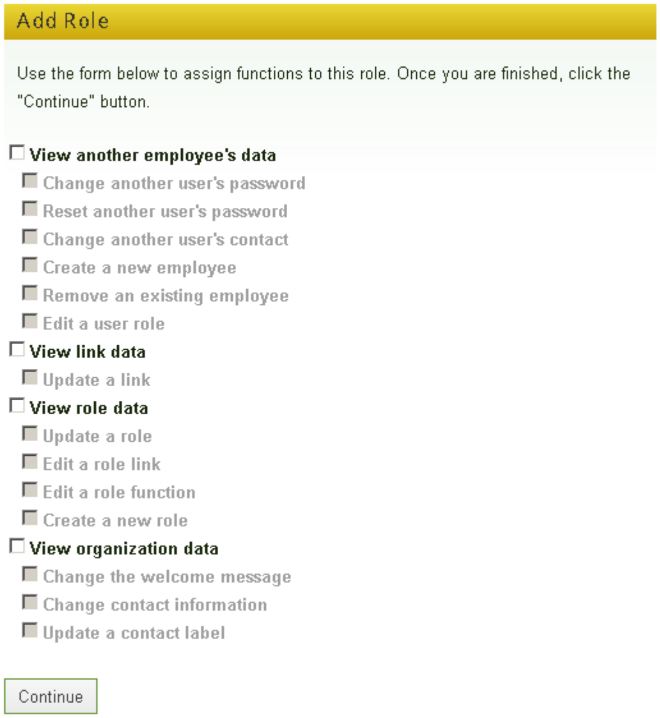


Add Role

Use the table below to assign links to this role. Once you are finished, click the "Continue" button.

Link Name	Role	Selected
Aglearn	EMPLOYEE	☐
Apply for a job (Avue)	EMPLOYEE	☐
CareerTrak	EMPLOYEE	☐
CBMS Dev	EMPLOYEE	☐
CBMS Test	EMPLOYEE	☐
Classify/Staff a job	EMPLOYEE	☐
CRMDEV89	EMPLOYEE	☐
DeltaCore Dev	EMPLOYEE	☐
DeltaCore Test	EMPLOYEE	☐
eForms	EMPLOYEE	☐
Employee Personal Page	EMPLOYEE	☐
EmpowHR	EMPLOYEE	☐
eOPF	EMPLOYEE	☐

Finally you will select the functions for your new role. Place a check mark in the box next to the function you want to apply. To select a sub function you will first have to select the primary function. If you want to be able to "Update a Role" or "Edit a Role Link" you will first need to select "View Role Data". When you are done adding functions click the "Continue" button and you can review your role properties.



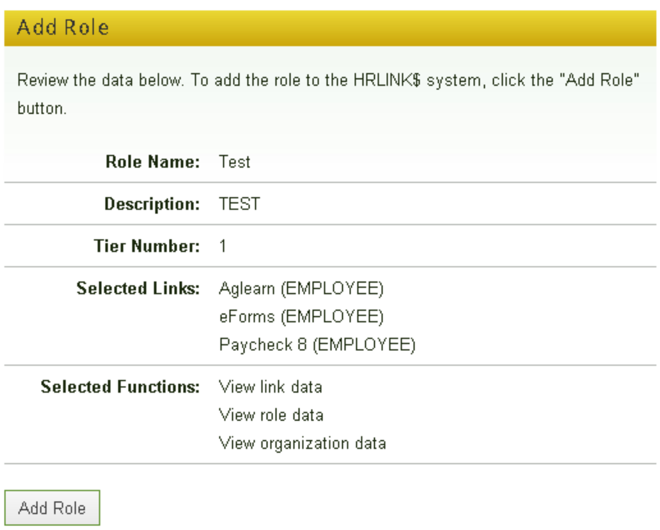
Add Role

Use the form below to assign functions to this role. Once you are finished, click the "Continue" button.

- View another employee's data
  - Change another user's password
  - Reset another user's password
  - Change another user's contact
  - Create a new employee
  - Remove an existing employee
  - Edit a user role
- View link data
  - Update a link
- View role data
  - Update a role
  - Edit a role link
  - Edit a role function
  - Create a new role
- View organization data
  - Change the welcome message
  - Change contact information
  - Update a contact label

Continue

Review all the properties you have added to your new role, and click the "Add Role" button to finish creating your new role.



Add Role

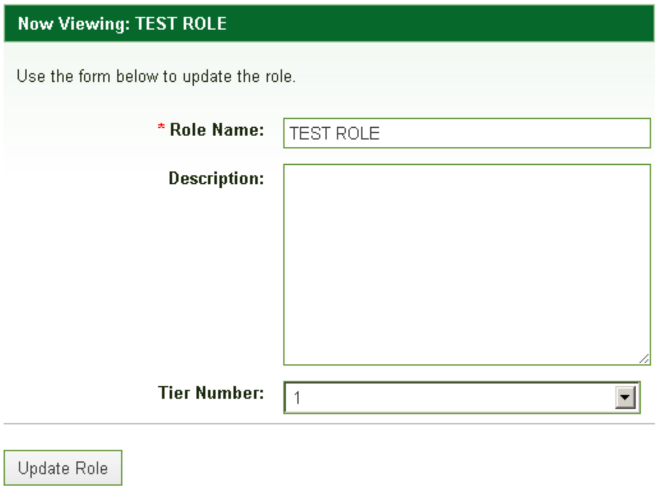
Review the data below. To add the role to the HRLINK$ system, click the "Add Role" button.

Role Name:	Test
Description:	TEST
Tier Number:	1
Selected Links:	Aglearn (EMPLOYEE) eForms (EMPLOYEE) Paycheck 8 (EMPLOYEE)
Selected Functions:	View link data View role data View organization data

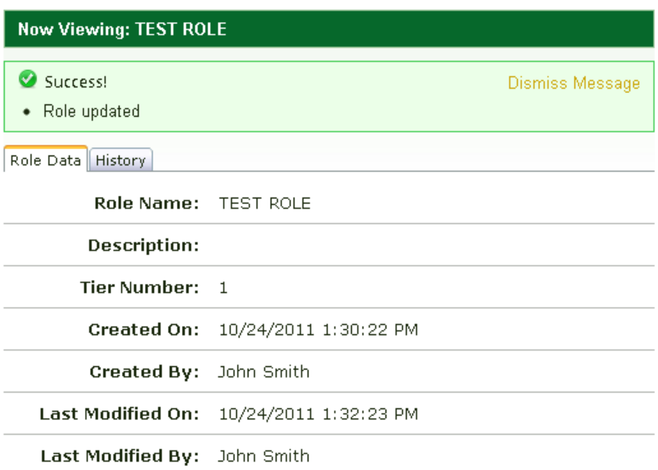
Add Role

3.4.2 Update Role

The Update Role option will allow you to edit the Role Name, Description, and Tier Number. After making your changes click the "Update Role" button.

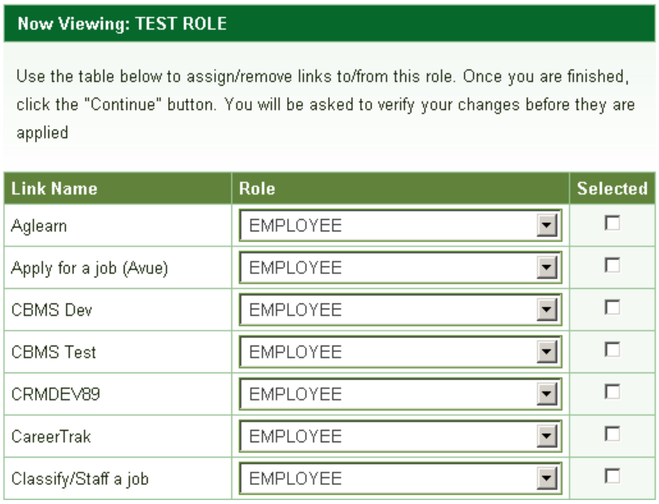


You will be taken back to the Role Data tab on the details screen and given a confirmation message that your changes have been saved.

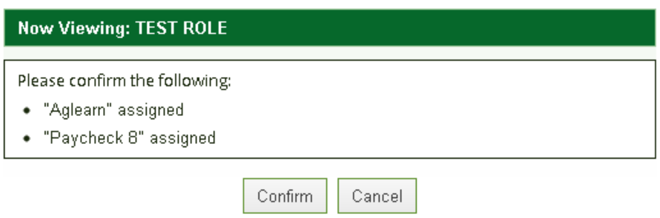


3.4.3 Edit Role Links

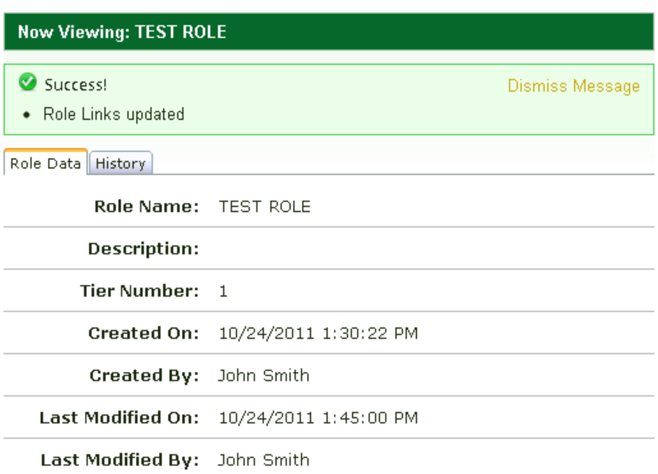
The Edit Role Likes option will allow you to edit the links that are available in the left navigational bar and the role within those links. After making your changes click the "Update Role" button.



You will be taken to a summery page where you can review your changes. Click the "Confirm" button to finish saving your changes.

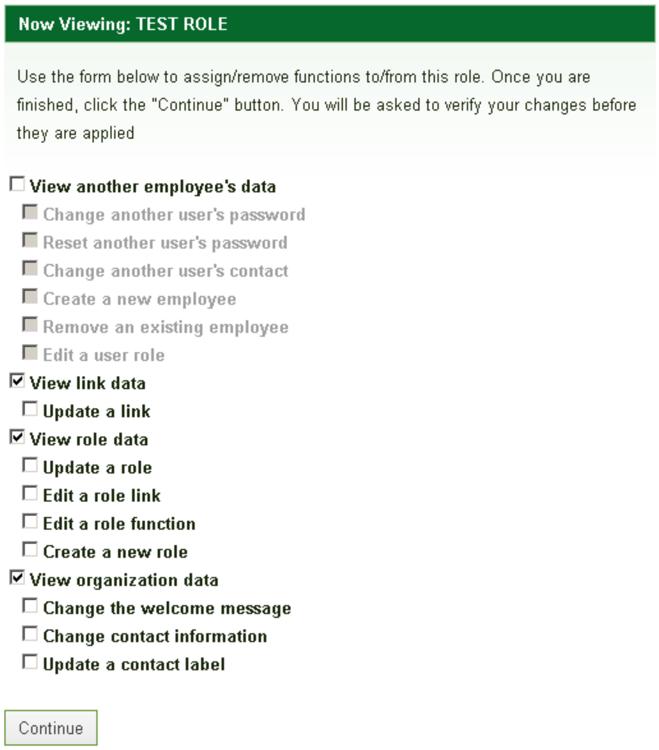


You will be taken back to the Role Data tab on the details screen and given a confirmation message that your changes have been saved.

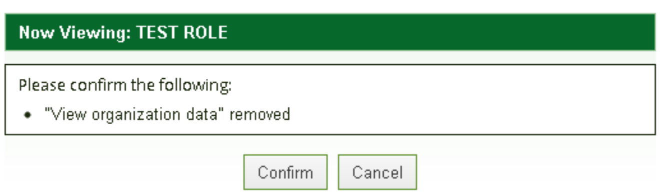


3.4.4 Edit Role Functions

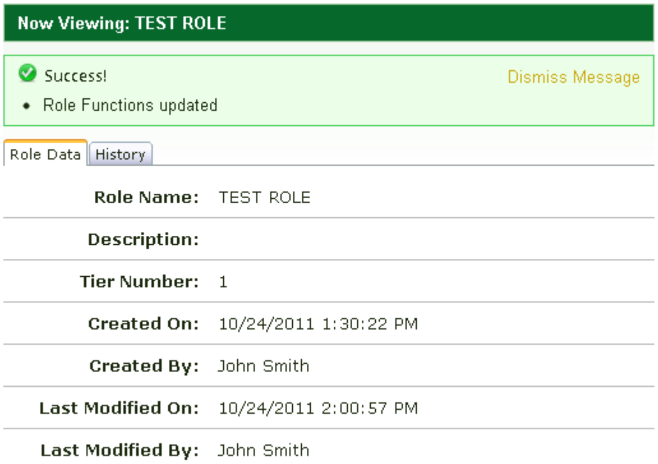
The Edit Role Functions option will allow you to edit the options that are available to you within ConnectHR. After making your changes click the "Continue" button.



You will be taken to a summery page where you can review your changes. Click the "Confirm" button to finish saving your changes.

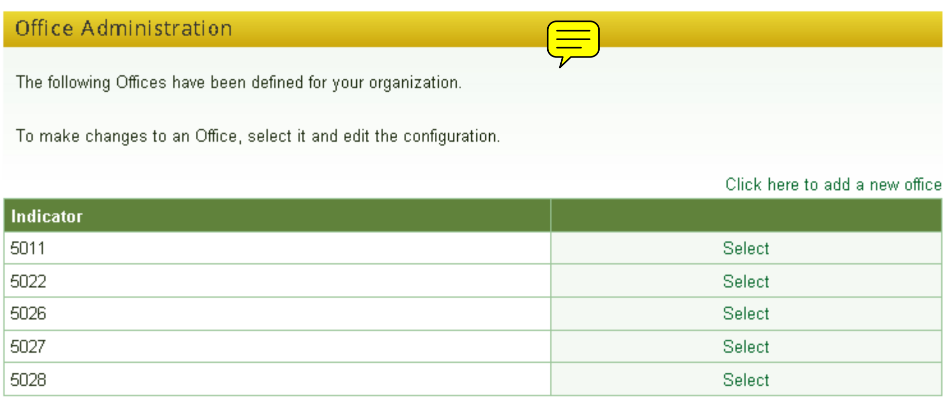


You will be taken back to the Role Data tab on the details screen and given a confirmation message that your changes have been saved.



3.5 Manage Offices

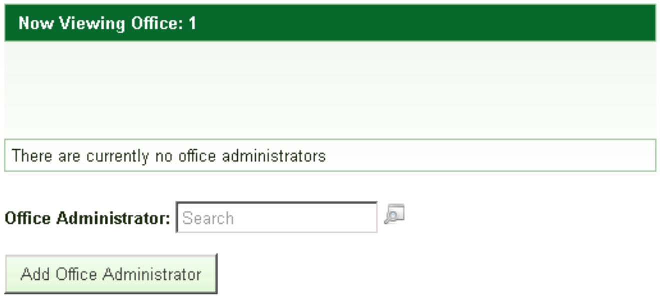
From the Manage Offices page, you will be able to see the list of active offices defined for your organization.



To view information about the office, click the "Select" link next to the Indicator.

3.5.1 Manage Office Admins

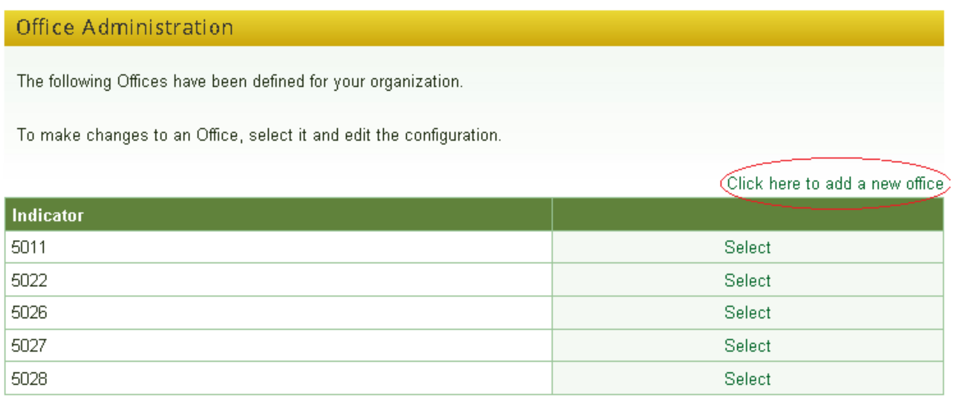
While you are on the office information screen you will see a link in the right navigation bar that says "Manage Office Admins". There you will be able to add Administrators to the office you selected.



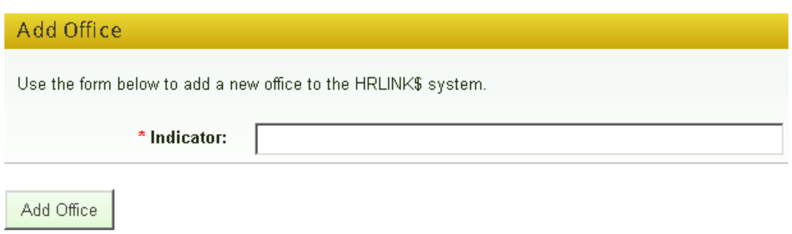
Search and select the person you wish to designate as the Administrator and click "Add Office Administrator".

3.5.2 Add New Office

To add a new office, click on the "Click here to add a new office" link on the top right of the offices grid.

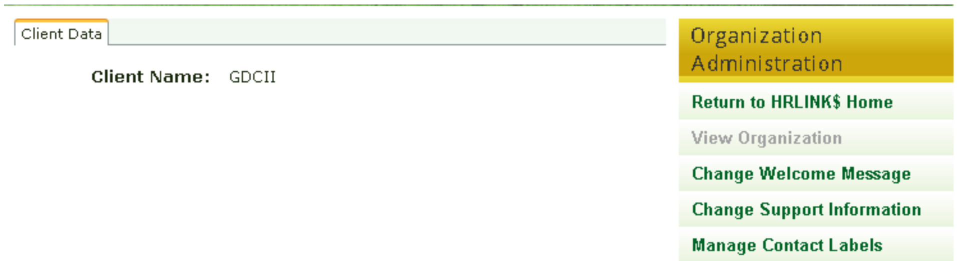


Then enter the Indicator you wish to add and click "Add Office".



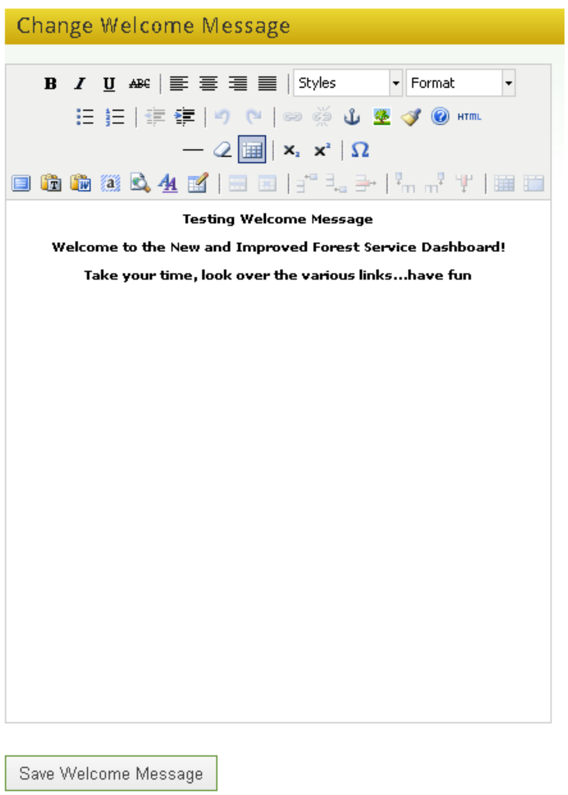
3.6 Manage My Organization

On the Manage My Organization screen you will see your Client Data and have to option to Change the Welcome Message, Change Support Information, and Manage Contact Labels.

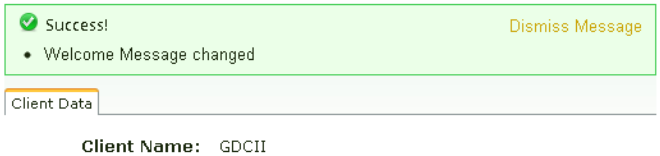


3.6.1 Change Welcome Message

On this screen you will have the ability to change the welcome screen that every one will see on their ConnectHR home screen. You can create your welcome message and apply numerous formatting options. After you have completed editing your welcome message click the "Save Welcome Message" button below the welcome message editing field.

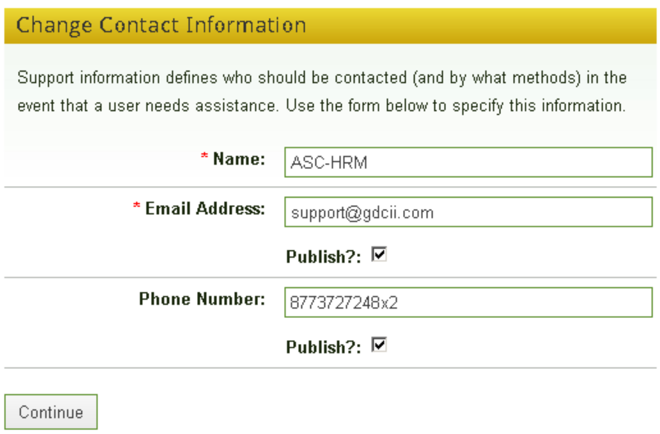


You will be taken back to the Client Data tab on the details screen and given a confirmation message that your changes have been saved.

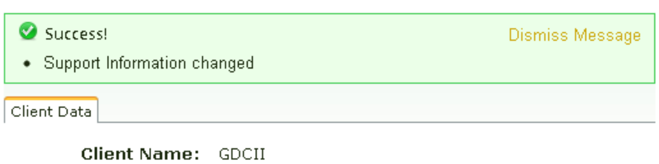


3.6.2 Change Support Information

Here is where you will edit and update the support contact information. Click the "Continue" button to save any changes you have made.



You will be taken back to the Client Data tab on the details screen and given a confirmation message that your changes have been saved.



3.6.3 Manage Contact Labels

If you need to edit the contact labels for the user contact information, you can do that here.
Click "Edit" next to the label you wish to change.

Manage Contact Labels

Contact Label	Required?	Domain	
Primary Email	True		Edit
Alternate Email	False		Edit

You can change the label, make the field required, and require email to have a specific domain. Click "Update" to save your changes, and "Cancel" to back out without saving.

Manage Contact Labels

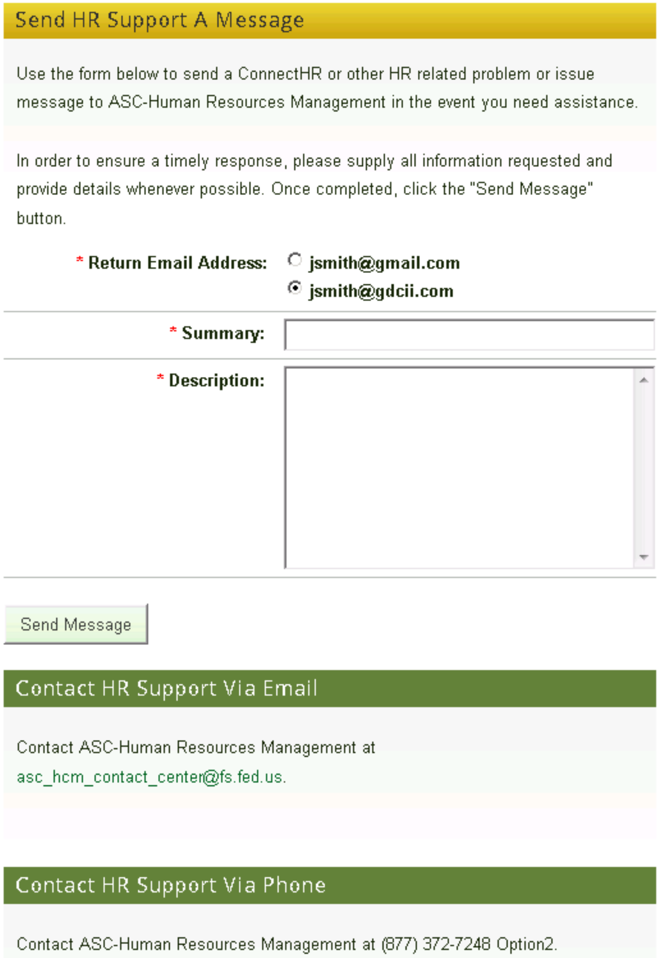
Contact Label	Required?	Domain	
Primary Email	☑		Cancel Update
Alternate Email	False		Edit

The edit fields will close and become read only showing that your changes have been saved.

3.7 Contact Support

If you are having difficulties with ConnectHR, or another database within ConnectHR and are unable to submit a Case using the "HR Help (CRM)" you can contact HR Support by clicking on the "Contact HR Support" link on the right navigation bar.

Select a return email address, summary or subject, and a detailed description of your issue or problem you are experiencing. The HRM Contact Center will then respond to you in a timely manner.

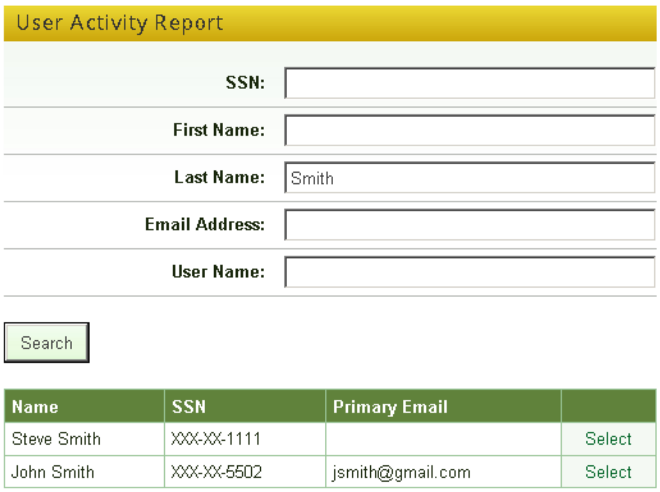


3.8 View Reports

On the View Reports screen you can run different User Reports and Role Reports. The User Reports gather user specific information in ConnectHR, like Activity Reports and Login Reports. Role Reports collect information for each role within ConnectHR.

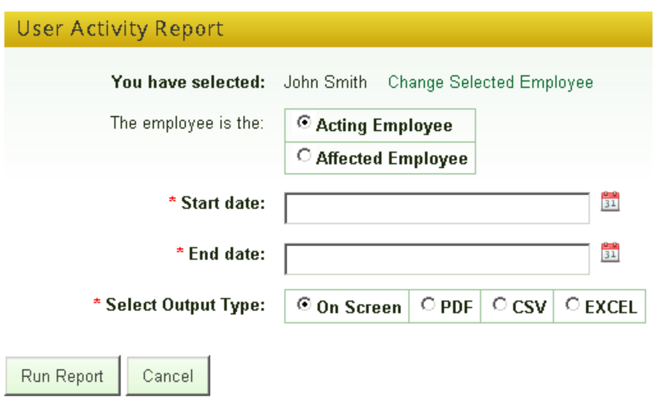
To begin, first select the report you wish to run.

After selecting the type of report you wish to run, you will then enter the parameters of the report. For User Reports you will first search and select the user you will report on by entering either Social Security Number, First Name, Last Name, Email Address, or User Name and clicking "Search".

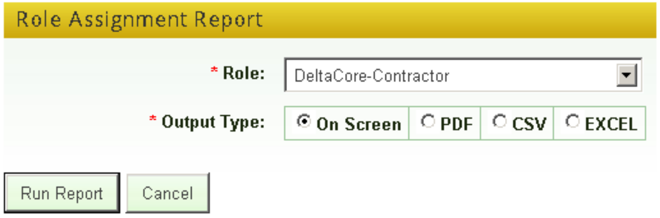


The search results will appear below the search fields. Click "Select" next to the desired user.

After selecting your user, you will select either Acting Employee if you are searching for what actions were taken by the selected user, or Affected Employee if you are searching for what actions were done to the selected user. Then select the time frame in which you are search in by entering the Start Date and End Date. After filling in the search parameters, you will select the output type. You have the option to view the report in the web browser by selecting "On Screen", or in a PDF, CSV, or Excel format. Click "Run Report" when you have finished making your selection.



For Role Report you will need to select the type of role you wish to report on. After selecting the Role, you will select the output type which is the save for user reports. Click "Run Report" when you have finished making your selection.


Role Assignment Report
* Role:
DeltaCore-Contractor
* Output Type:
On Screen
PDF
CSV
EXCEL
Run Report
Cancel

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