EVALU-8 INITIAL SET-UP GUIDE
EVALU-8 SOFTWARE INITIAL SET-UP

Thank you for choosing to use Alcumus's new platform Evalu-8. We've been working with Evalu-8 to offer you a digital solution to your HR and Health and Safety tasks. We're looking forward to working with you to get you up and running as smoothly as possible.

This onboarding guide is designed for system administrators and will take you through the basics of navigating the system, configuration, settings and roll-out. Evalu-8 is cloud based software so there is no installation required; all you need is an internet connection, the URL to the portal and your username and password. All of these are contained within your welcome email.

Throughout the system there are question mark icons. If you hover over them, a dialogue box will appear which explains what something means or does. Further how-to guides are available here.

THE DASHBOARD

When you and your colleagues log in for the first time, your dashboard will be empty, as shown below:

![Dashboard Image]

WHAT YOU NEED TO DO

1. In the top right-hand corner, just below where it says your name is a dropdown menu. In that menu, you (and your colleagues) will see a list of available “widgets”. We will talk later in this guide about how you can control which widgets an employee can have access to. Widgets are the different tools Evalu-8 offers.

2. To put a widget(s) on your dashboard simply tick the box to select it and click save.

3. Click on the red padlock icon and it will turn green, this enables you to move the widgets into place by dragging them with your mouse.

4. Click on the green padlock to turn it red and lock the widgets in place.
USERGROUPS AND PERMISSIONS

Evalu-8 comes with three user groups (but you can add more). Each employee needs to be assigned to a user group. The user group is how you determine what each employee can see or do. The three basic user groups are: Administrator (you), Manager and User. These default settings can be customised and as previously mentioned, you can also create as many different user groups as you require.

WHAT YOU NEED TO DO

1. To add additional user groups, click on the green “add new user group” button at the top and select the options in the dialogue box, including the option to copy an existing user group.

2. Now we need to set permissions for each user group. Click Admin then Permissions and you will see the following screen:

3. On the left-hand side, all your user groups will be displayed, click on the user group you wish to edit, so it is highlighted in blue. The example above has Administrator highlighted.

4. Next you need to determine what employees, that are part of the Administrator group, can see or do by following these three steps:
STEP 1
Determine which employees (if applicable), each user group can see, by selecting the relevant option (see image):

In the example above we have “All employees” selected. This means, people assigned to this user group (Administrators), will be able to see themselves, their direct reports and all other employees.

If you select “Self” it means people in that user group will only be able to see themselves. In the system, this is what you would usually select for regular users/employees.

If you select “Direct Reports” which is what you would usually select for “managers”, a second option will appear:

The second option “their employees’ employees” means you can choose whether you would like people in this usergroup to see themselves, their direct reports and anyone who reports to people that report to them.
STEP 2
Determine exactly what personnel information you want members of each user group to access in the user details section (employee electronic personnel file).

In our example, we are using an “Administrator”, who can see “all employees” so there are three columns displayed in the User details Page tab which is highlighted in blue at the top of the grid/table. One column is for Self, one for Direct Reports and one for All.

In each column you can set a field to visible, which means the corresponding tab will be present in the user detail section and you can set a field to read only which means the tab will be present in the user details section, but you cannot interact with it.

THIS IS HOW IT WORKS:

Self column, if visible is set to green it means you will see the tab in your own user details section. If it is set to red, the tab simply will not be there. So if the tab is not relevant to an employee, turn it to red and this will not be displayed in the user details section. If you set the function to read-only, then it will be there but you cannot interact with it. For example in the Training tab, you would be able to see your training, but not amend it yourself.

Direct reports column, this is what you will see, as an Administrator or Manager if you look at one of your direct reports’ user details section. This is not what your direct report will see when they look at their own record.

All employees column, this is what you will see, as an Administrator when you look at any employee user details section that is not your own, or one of your direct reports.
The images above show examples of the Manager and User user groups. As you can see, for the Manager the “all employees” section is greyed out as they are set to only be able to see themselves and their direct reports. The “User” can only see “self”. “Users” can only control what they will see on their own user details profile.

**STEP 3**

Now we have sorted out the personnel files, we need to sort access permissions to all the other functions for our user groups. As you can see in the image below, the second tab, called page permissions again offers a menu of functions. It is in this area that you control which features will be available to each user group. By clicking on visible and turning it to red you will turn off a function and it will disappear from a particular user group:
For example, you can turn the expenses function on or off by user group. So if, as a company you are not going to use the expenses feature, you can disable it by turning the option from green to red and it will disappear from all menus.

In some sections there are what we refer to as “blue button options”. This is where a set of sub-permissions can be found. Again, using expenses as an example, you can control what employees in a user group can do with expenses such as mark them as paid and mark them as reconciled, by using the blue button options.

DON’T FORGET

• If you get stuck, you can hover over the question mark icon for further information.

• It is worth checking this page periodically as new features are regularly added that you may benefit from and may be turned off by default.

SETTINGS

There are two main areas for settings, which control company wide information within the system. These can be found on separate tabs, but both can be found via the top menu via Admin and Settings.

The page you land on (basic info) is where companywide configuration/preferences take place, and the settings tab is where you control the content of the various drop-down menus within the system.

BASIC INFO TAB (COMPANY-WIDE INFORMATION)
In this tab you can set global rules such as leave accrual (eg. Each employee is entitled to an extra day’s leave for each year served), company leave year, ID badge settings, 2FA and so on. These rules will then apply to all employees but can all be over written on an individual employee basis in the employees user details section.

You can also set the main address for the organisation and upload the company logo on this page.

**SETTINGS TAB (DROP DOWN MENU CONTROL)**

In this section you set up and edit the various drop down options such as leave types, roles, working patterns, training types and file categories.

In here you can add new sites and departments and view the QR codes that are automatically assigned to them. You can then print these QR codes and use them for employees to scan to clock in or out via the App.
EMPLOYEE “MASS EDIT”

Now you have configured all the settings, you need to apply the appropriate settings to each employee.

There are two ways to do this:

1. Click Admin, then Employees from the top menu and go through your employees individually.

2. Use Employee “mass edit” which allows you to do this on a larger scale. The mass edit tool is pictured below.

Find mass edit from the top menu in Reports, Company and then Employee Mass Edit. In here you can edit multiple employees’ details, set working patterns, assign user groups and settings from one screen.

When you are ready to roll the system out to employees you can also use the mass edit function to generate and save a password for your employees and then send them the welcome email.
DASHBOARD WIDGETS

As promised earlier in the guide, you can now control which widgets the employee will have access to on their dashboard by going into their user details section.

Simply turn off (make red) any widgets that are not required for that employee and they will not appear in the widget dropdown menu on the dashboard.
CHECKLIST

Before you roll the software out company wide, we would recommend you go through the following checklist:

COMPANY SETTINGS

- [ ] User group permissions set
- [ ] Leave year set
- [ ] 2FA set (if applicable)
- [ ] Leave accrual rules set (if applicable)
- [ ] Leave types set

EMPLOYEE SETTINGS

- [ ] FTE amount set
- [ ] Start date set
- [ ] Working pattern set
- [ ] User group set
- [ ] Reports to set
- [ ] Leave approver set
- [ ] Set username and password

ONCE YOU HAVE TICKED ALL THE BOXES, YOU ARE READY TO ROLL OUT EVALU-8.

HELP AND SUPPORT

Detailed user guides and videos can be found here. You can contact us if you require support via the green “help” button at the top right of the screen; where you can ask questions or share ideas and recommendations for future development.

PHONE: 0845 6492997 or EMAIL: support@evalu-8.com
ABOUT ALCUMUS

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Our people are at the heart of our business, building strong relationships with our clients to understand their needs, minimise risks and navigate compliance through our in-depth knowledge of your sector, regulations and challenges.