

## **Overview**

The Human Resource (HR) screens in isolved offer a tracking mechanism that provides valuable insights for effective employee management. These HR screens can store information about employees' certifications. This data is accessible to employees, managers, supervisors, and HR administrators via Employee Self-Service. With easy access to performance data, managers can make informed decisions regarding job changes, promotions, and evaluations.

To get started, navigate to **Client Management > HR Management > Training and Development > Certifications** and enter the HR data that is most important to your business.

## **Create a List of Company Certifications**

What types of certifications do your employees hold? When should they be re-certified? Add each of the certifications that an employee may earn at your company. This list then becomes a drop-down where you can make selections for each employee. You may add new items to the list at any time.

Certifications	isolved University
+ Add New V Expand All Groups Collapse All Groups Clear	Grouping/Filters
Status 1	Q Search
Description 1	Actions
<ul> <li>Status: Active (4)</li> </ul>	
СРР	$\mathscr{O}$ $\times$
CPR	ØX
Drivers License	0 ×
FPC	0 ×
• Status: Inactive (2)	

- 1. Click Add New.
- 2. Enter a name for the certification in the **Description** field.
- 3. Click Save.

Note: If Inactive is selected, the description does not appear in the Employee Certification drop-down menu.

## **Email Alerts**

Employees, managers, or administrator users may be notified by email when the employee's certification is ready to expire or has recently expired. Select the **Email Alerts** tab.

- Using the certification email alerts feature is not a requirement for certifications.
- Certification email alerts generate daily at 5 p.m. ET.
- The expiration date on the employee's certification screen determines when email alerts are generated based on parameters you create on the **Email Alerts** tab.
- Alerts do not generate for inactive employees.
- Email templates need to be created for the certification email alerts.
- Multiple emails can be sent for each certification (see screenshot).

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Certifications

#### Help Docs

I Save ← Go Back to List					
Certification					
* Description Dri	ivers License				
	Activo				
	Active				
Email Alerts					
Email Alerts		1	This number o	f	
Email Alerts * Send this email	* To this user type	ا User group	This number o days	f Send date option	Actio
Email Alerts * Send this email Certification Expiring	* <b>To this user type</b> Employee	User group	<b>This number o</b> days 30	f Send date option Before expiration date	Actio
Email Alerts * Send this email Certification Expiring Certification Expiring	* <b>To this user type</b> Employee Employee	T User group	This number o days 30 14	<b>f</b> Send date option Before expiration date Before expiration date	Actic
Email Alerts * Send this email Certification Expiring Certification Expiring Certification Expiring	* <b>To this user type</b> Employee Employee Employee	T User group	<b>This number o</b> days 30 14 7	f Send date option Before expiration date Before expiration date Before expiration date	Actic
Email Alerts * Send this email Certification Expiring Certification Expiring Certification Expiring Certification Expiring	* <b>To this user type</b> Employee Employee Employee Employee	T User group	This number o days 30 14 7 3	f Send date option Before expiration date Before expiration date Before expiration date Before expiration date	Actic  

Note: To create an email template or a Client User Group, navigate to Client Management > Workflow Setup > Client User Group and Email Templates.

- Send this email: This is a drop-down list of all certification email templates.
- **To this user type:** There are four user types: "Employee," assigned or organizational, "Manager," assigned or organizational, "Supervisor," and "Client User Groups."
  - **Employee:** The email is sent to the employee.
  - **Manager:** The email is sent to the employee's manager.
  - **Note:** No email is sent if the employee doesn't have a manager assigned.
  - Supervisor: The email is sent to the employee's supervisor.
     Note: No email is sent if the employee doesn't have a supervisor assigned.
  - o **Client User Groups:** The email is sent to every client user within the client user group.
- User group: The drop-down lists all Client User Groups and is only available if your chosen user type was created under Client User Groups.
- **This number of days:** This field allows you to enter the number of days before and after the expiration date that you wish the email to be sent.
- Send date option: This drop-down menu allows you to select the days "Before Expiration Date" and days "After Expiration Date."

### **Recording Employee Certifications**

Navigate to Employee Management > Human Resources > Training and Development > Certifications.

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### Help Docs

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+ Add New 🗸 Expand All Groups 🔨 Collapse All Groups 🖒 Clear Grouping/Filters										
Drag a column header here to group by that column 🕒 🔍 Search										
Certification	Effective Date	Expiration Date	Authority	ID Number	Total Cost Reimburse	ment A † App	proval Date 🍸	Reimbursement D	T Comments	Actions
Drivers License		04/22/2025	Florida	B321654987321						ØX
Certification *	СРР	A -	uthority A	APA	Reimbursement amount	350.00	8	Comments		
Effective date	02/12/2024	🙁 🖬 II	number		Approval date	03/01/2024	8 🖬			
Expiration date	02/01/2027	🛛 🖬 т	otal cost 7	700.00	Reimbursement date	03/08/2024	⊗ ⊡			
									s	Cancel

- 1. Click Add New.
- 2. Select the **Certification** from the drop-down (required).
- 3. Add **Authority** (optional).
- 4. Enter the **Effective Date** (optional).
- 5. Enter the **Expiration Date** (required if you use the email alert).
- 6. Enter ID Number & Total Cost (optional).
- 7. Add Employee Reimbursement information, if desired. This does not automatically pay the employee.
- 8. Click Save.

A history of all employee certifications is maintained at the top of the screen.

Certification <b>T</b>	Effective Date	Expiration D 🍸	Authority	ID Number	Total Cost	Reimbursement.	1	Approval Date 🕎	Reimbursement 🝸 Comments	Acti	ons
Drivers License		04/22/2025	Florida	B321654987321						Ø	×
СРР	02/12/2024	02/01/2027	APA		700.00	35	50.00	03/01/2024	03/08/2024	Ø	×

### Reports

Navigate to **Reporting > Client Reports** and select the **HR Reports** category or filter for the appropriate report name.

Client Reports			
Report Category:	HR Reports	~	
Search:			Filter
≑ Output Name		≑ Re	port Type
Employee Certification His	tory Report	Date	Range

- Select "HR Reports" for **Report Category**.
- "Employee Certification History Report" provides all certifications entered within the date range or by payroll run.

#### Certifications

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#### Help Docs

## **Employee Admin Tools**

For additional information on using the **Certifications** analytic tool, please refer to the article <u>Employee Analytics</u> <u>– Certifications</u>.

Certificatio	ns							
✓ Expand All Grou	ps \land Collapse A	ll Groups 🖞 Clear Grou	ping/Filters					
Drag a column head	der here to group by	/ that column						8 4
Employee Na 🍸	Employee ID 🍸	Status Description 🝸	Certification					
			Authority 🍸	Title † 🍸	ID Number	Effective Date 🍸	Expiration Date	
Q	Q	Q	Q	Q	Q	۹ 🖬	Q	
Daniel L Adams	1004	Active	APA	CPP		7/16/2020	12/31/2024	
Linda Brown	1080	Active	APA	CPP		2/12/2024	2/1/2027	
Daniel L Adams	1004	Active	NY	Drivers License	NY15666688	8/27/2019	8/26/2024	
May Alexander	1066	Active	Florida	Drivers License	A123456789	8/1/2022	8/1/2027	
Tyler Franklin	10010	Active	Michigan	Drivers License	F14712415417475	6/5/2022	6/5/2026	
Julius Morgenson	10000	Active	California	Drivers License	M541214587451	5/4/2022	5/4/2026	
Karen Pennington	10003	Active	Michigan	Drivers License	P1214547845124551	5/4/2020	5/4/2025	
Kris T Pretender	10007	Active	Florida	Drivers License	P147258369	5/1/2021	5/1/2026	
Alice Thompson	1095	Active	New York	Drivers License	T560 8815 236 1457	8/5/2021	8/5/2025	
Ronald Hughes	1016	Active	Project Managem	IAPM		6/13/2019	6/13/2024	

## **Report Writer**

Navigate to **Reporting > Report Write**r to create a custom report for HR subjects. All data stored for the HR topics is available in Report Writer, allowing you to create a custom report. The report can pull multiple entries to reflect all the employees' records.

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Certifications
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- 1. Click Add New.
- 2. Select Report Type: "HR Report."
- 3. Select Sub Report Type: "Certification Report."
- 4. Select a Report Title.
- 5. Select a Font Size and Font Face.
- 6. The **Report Orientation** defaults.
- 7. Select a **Report Group** (if a particular group is needed, contact your Service Bureau).
- 8. Click Save.
- 9. Add Columns

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- 10. Select the Field Category from the drop-down (e.g., "Employee certifications" or "Employee Status").
- 11. In the **Column** area, highlight the column headers that should be included and use the >> and << arrow keys to move them in and out of the report.
- 12. Save.

Note: You can sort the columns using the arrow keys next to the added columns.

	Search for Fields						
-	Search for fields						
Field Category: Columns	Employee Certification	is 🗸 🕻	•		Added Columns		
Category	,	Column	^			Category	Column
Employee Certifications		Certification			Employee Job		Location Code
Employee Certifications		Authority		~~~	Employee Job		Department Code
Employee Certifications		Cost			Employee Data		Employee Number
Employee Certifications		Effective Date			Employee Data		Employee Name
Employee Certifications		Expiration Date					
Employee Certifications		ID Number					

### Edit Columns

- Columns can be edited to change the width, alignment, position, sort, and value, depending on the user's needs.
- Click **Save** when editing is complete.

Report Setu	ip Add Columi	1S Edit Columns	Report Fi	ilters Pre	eview By Compa	ny			
ecord Type:	Detail Record	Filter	* Width	* Sort	Eixed Pos	≜ Group	+ Add New 🕜 Edit 🏛 D	elete 🎜 Refresh  🖻 Save 🛞 Ca	n
Hidden	Employment	Status	• widdi	* 30H		* Group	Column Details	Consult for Fields	
1	Division	Code	1.0000	1			Field Category:	Search for Fields	
2	Department	Code	1.0000	2			* Field:	Employment Status	
	Employee	Number	1.0000				Heading1:	Employment	
		Employee Name	2.0000				Heading2:	Status	
5		Certification	2.0000					V Hidden Column	
5	Start	Date	0.6500				Default Value:		
7	End	Date	0.6500				Column Position:		
							Column Width:		

You may change any of these fields now or return to these choices after printing the report. After you have saved the report, additional tabs are available to you to create the report.

See the article, <u>Report Writer Users Guide</u>, in the isolved University Library for additional information on Report Writer functionality.

### **Report Filters**

- Report filters can be set on the column for a specific filter value. For example, the "Employment Status" column can filter "Active" employees.
- Click **Save** when filters are completed.

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## Help Docs

Report Setup	Add Columns Edit Columns Report Filters Previe	w By Company			
\$	Column	+ Add New 🕑 Edit 📋 Delete	e 📿 Refres	sh 🗄 Save 🛞 Cano	el
	Employment Status				
AND	Certification	Filter Details	rtification		
		* Operator: In	runcation		
		Filter Value			
		FPC Food Handling Safe Food Security Cert A Six Sigma - Green Belt Sample HR Certification	*	CPP IAPM Drivers License Notary Certification CPR	

#### Preview by Company

- 1. Choose the desired **Company**, **From Date**, **To Date**, **Date Type**, and **Output Type** for the report.
- 2. Click Generate Report.
- 3. Click Go To My Report Queue and view the report.

🔟 Generate Report 🕜 Go To My Reports Queue							
Once your report request has been submitted you can do available in My Reports Queue for 72 hours.							
Employee Certifications							
Company:	All Companies 🗸						
From Date:							
To Date:							
Date Type:	Pay Date 🗸						
Output Type:	Excel 🗸						

1	A	В	C	D	E	F	G
1	Division Code	Department Code	Employee Number	Employee Name	Certification	Start Date	End Date
2	01	50	1080	Brown, Linda	Drivers License	4/22/2021	4/22/2025
3	01	50	1080	Brown, Linda	CPP	2/12/2024	2/1/2027
4	02	20	10000	Morgenson, Julius	Drivers License	5/4/2022	5/4/2026
5	02	50	1035	Brown, Mary	CPP	5/1/2022	5/1/2025
6	03	20	1004	Adams, Daniel L	CPP	7/16/2020	12/31/2024
7	03	20	1004	Adams, Daniel L	Drivers License	8/27/2019	8/26/2024
8	03	20	1004	Adams, Daniel L	Notary Certification	5/1/2020	5/1/2024
9	03	70	1016	Hughes, Ronald	IAPM	6/13/2019	6/13/2024
10	07	40	1066	Alexander, May	Drivers License	8/1/2022	8/1/2027
11	07	40	10010	Franklin, Tyler	Drivers License	6/5/2022	6/5/2026
12	67	50	10003	Pennington, Karen	Drivers License	5/4/2020	5/4/2025

#### Certifications