HRACUITY®

Implementation Overview

This Implementation Kit has been designed to help you and your organization prepare for a smooth adoption of HR Acuity.
Your HR Customer Support Specialist will work closely with you to complete a successful rollout and ongoing application experience.

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Next Steps

Initial Set Up

Your primary contact will be set up as a Super Administrator to configure your HR Acuity site. They will receive a system generated email with instructions on how to log into HR Acuity.

The HR Acuity Support Center has documentation and recorded videos to help you configure your HR Acuity site and step your users through the training and adoption program. You will see links and icons throughout this document to guide you through the process:

Configure and upload your Employee Data File.

Configure and generate a .CSV file of employee data to import from your HRIS to HR Acuity. If your organization cannot configure and Employee Data file, not to fret. As a Profile Admin, you can manually enter employees to the system as you go. There is more information on this 'how to' in the Employee Data file Module.

Configure and set up your HR Acuity users.

HR Acuity users can be set up with specific permissions in terms of what types of cases they can document, view and report on. Permissions can be assigned for specific Groups as well.

Training and Adoption

HR Acuity recorded training is available in the Support Center to step your users through the training and adoption process.

Additional Configuration (Optional)

Configure and upload your HR Acuity Groups and Location. Groups and Locations are the primary data elements that will be used for reporting and analytics.

On-going Support

HR Acuity Customer Support is available by emailing support@hracuity.com Monday through Friday from 8:00 am to 6:30 pm ET.

Set up and Configuration

This Implementation kit has been developed to prepare your team for a smooth rollout of HR Acuity. You will complete this kit with the assistance of the Customer Support Team who will answer any questions you may have.

Customer Support Team Member	Key contact who will answer any questions you have about the implementation material and processes.	Patrice Crocevera support@hracuity.com 888.598.0161

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To configure your HR Acuity site, there are three files that you may decide to populate with information that will upload into HR Acuity. These files are your Group File, Location File and Employee Data File. Please read below to understand how these files affect your experience with HR Acuity. Groups can be organized into its own file and manually uploaded into the system or entered manually entered directly into the system.

Employee Data File

The Employee Data File contains Employee ID, First Name, Last Name, Title, Division, Group, Location, Manager, Email, Office Address. The only fields that are required are the Employee ID, First Name, Last Name, and email for Users of HR Acuity. The group and location information that is located on the Employee Data File (EDF) will compare against the group and location information that is in HR Acuity. This information must match for the information to be imported. If using Group ID or Location ID, Groups and Locations with existing codes will update or add the group and location names associated with the code and must be updated before the EDF to import and process successfully. Please see group and location file web pages for more information on this topic.

Watch this video to configure and upload your Employee Data File.

NOTE: As part of our security protocol, employee data files must be transmitted through a secure process. We will provide you with a SharePoint link that will enable you to place your file in a secure folder dedicated to your organization. Let us know if you prefer another method.

We cannot accept an employee data file through email.

User Permissions and Security – Life after Configuration

After implementation, as an Administrator or Super Administrator (described later in this section) you will be able to add or change user permissions. User Privileges are designated based upon specific Case, View, Reporting and Administrative permissions. It is important to have an initial understanding of permissions to ensure that users can only access information they are expected to see. Complete the attached **USER PERMISSIONS** spreadsheet to detail the privileges for your HR Acuity Users.

Case Permissions

Employee Relations (ER Cases): User has permission to document an employee relations case. Choose Yes or No.

ER Search Involved Parties: User has permission to search the involved parties on their current case for any case history. Choose Yes or No.

Organizations may not want to give this to all system users.

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Investigation (INV) Cases: User has permission to create or participate in an investigation. Choose Yes or No and select level of investigation case access:

- Intake Only: User has permission to start an investigation in Intake stage only.
- Investigator: User has permission to conduct an investigation as the Lead Investigator or to be part of the Investigation Team such as a Team Investigator, Advisor or Other Resource.
- Legal Advisor: The Legal Advisor has the same permissions in the system as an Investigator but can also be added as the Legal Advisor to an investigation team in order to maintain attorney-client privilege. This designation should be reserved for your in-house or outside counsel. Must be a user of HR Acuity.

Note: Organizations can have users that do not have any case permissions.

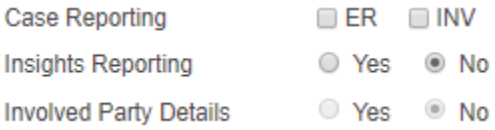
View Permissions

View permissions are first designated by the type of case. You can first designate whether you want a user to have permissions to view Employee Relations or Investigations.

Users may also be given permission to view cases within specific groups. For example, your VP of Human Resources may be designated with viewing permissions for all groups in your company. They can then view any case that is created within the system, regardless of whether they play a role in a specific case.

If a User does not have additional view permissions, he/she will only be able to access and view those cases which he/she creates or in which he/she is on the Investigation Team. You may have users that only have view permissions.

Reporting Permissions



Insights Reporting permissions allow users to run reports for cases within specific groups and/ or issues. You may have Users who just have reporting permissions. Insights Reports include general information about cases (name, date, investigator, actions, issue category) but do not provide case access. Users with view permissions can also be given reporting permissions for specific groups and/or issues.

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Involved Party Details Reporting gives users extensive reporting functionality. We advise you to use caution and only give Involved Party Details Reporting permissions to those users that need that level of reporting functionality. Involved Party Details Reporting will follow any group or issue restriction for the user.

Administrators

Administrative permissions can also be granted. A user can have all admin permissions, a few or none. Multiple users can have admin permissions. It is recommended you designate a user/s for each admin role.

Profile Administrators can add or change employee profile information, activate new Users or change user permissions for all or designated groups. A Profile Admin cannot access their own profile or user permissions.

Case Administrators can change the case owner on a case, reopen cases, delete closed cases, or put a case on hold (if enabled for your organization).

The Super Administrator has the same access as a Profile Admin and Case Admin. In addition, they can access their own profile and user permissions.

Configuration Administrator can change the dropdowns that have been configured for your site. The dropdowns include Notification Method, Actions, Issues, Groups, Locations, Issue Dispositions, and Case Report Configurations. For Exit and Post Hire Interviews, the Interview Functions, Separation Reasons, Hiring Source and Reason for Joining can also be changed. The Configuration Admin will also be able maintain the files in your document library.

Data Integration Administrator can manually upload the employee, group and location files.

Watch this video to configure and set up your HR Acuity users.

Training

HR Acuity provides web based, in person or recorded training based upon your subscription and service agreement. *Please note to access training articles and videos on our solution center, you MUST be logged into HR Acuity.

Training videos include:

a. Overview and How to Document and Employee Relations Case
b. Conducting and Documenting Investigations in HR Acuity

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c. How to plan and conduct investigation interviews in HR Acuity
d. Dashboards Overview
e. Insights Analytics Center Overview
f. Insights Analytics Center - How to filter data
g. Insights Analytics Center - How to add charts and graphs

Essential users complete 1 hour session of training to review all of the functionality available with unlimited email support.

System Integration

HR Acuity will work closely with your project team to prepare and deploy smooth implementation of HR Acuity, integrating seamlessly with your existing business platforms and processes.

Additional Configuration (optional)

Group File

Groups relate to a field used in HR Acuity that an employee may be associated with. They are used to facilitate user permissions, reporting, and case designation. When thinking about what information to use as groups, you'll want to consider how you will want to grant permissions and how those permissions will affect how you run reports. It is important to have an initial understanding of permissions as they will affect how your HR Acuity users will enter, see and report on cases. As an example, if you decide to restrict a user permission only to the 'Security' group, they will only be able to see cases and run reports that yield cases entered labeled with the group 'Security'.

Groups can be displayed either alphabetically or as a hierarchy and can have multiple levels within a hierarchy (parent/child/grandchild). Some examples organizations have used as groups are Brand, Department, Sector, Organization Chart, Business Units, and more.

Please follow the instructions on the Group File page online when preparing the CSV spreadsheet of Groups for upload.

Location File

In addition, if your organization has multiple locations, you may also configure the Locations field. Locations can be designated for each case and will appear on your Case Reports and are available when conducting a Case Search or as criteria for reporting. Locations only have 1 level.

Watch this video to configure and upload your Groups and Locations.

If you have questions about how best to set up these designations, your customer service representative can assist you. As part of this implementation kit, please complete and submit the **GROUP and LOCATION** spreadsheet or the Group template and Location template.

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