HRwize

Employee Self-Service Guide

Version 3.0
August 2022

Table of Contents

HRwize

How to use this guide?

This User Guide contains all the essential information for users to make proper use of the tool. HRWize is a powerful and feature rich human resources platform with different versions offering different features and functionalities. The look may differ slightly depending on the version your company is working with.

This guide includes a description of the system functions and capabilities and step-by-step procedures for system access and use.

Additionally, depending on your operating system and browser, there may be slight differences in how pages are laid out and displayed – this is perfectly normal and is to be expected.

If you have any questions, please contact your account administrator.

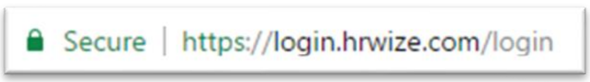
Login

The Login URL for HRWize is http://www.login.hrwize.com/login.

How do I know I am on the correct site and my connection is secure?

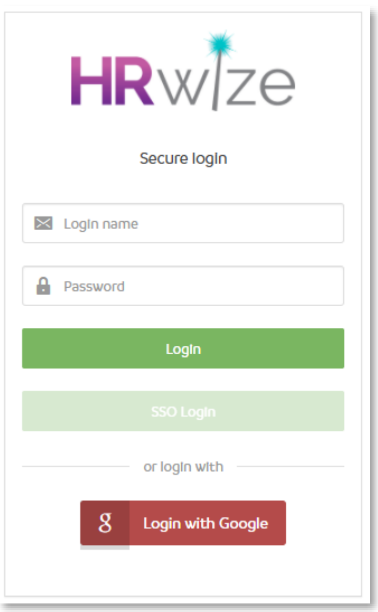
When you go to http://www.login.hrwize.com/login, there are three things you should check to ensure it is the correct site and that your connection is secure.

1. Ensure the URL is http://www.login.hrwize.com/login
2. Ensure that there is padlock next to the URL like the below image (the actual image will vary according to your browser):



3. You can click on the padlock image to verify the SSL (secure) certificate is valid and that the site is indeed genuine.

How do I login?



Here is how to login to HRWize:
Login name and Password

When your account was created, you would have been given a unique username and password and you should use these to login by entering the correct values in the relevant box.

Error 17: Incorrect Username and Password

If, when logging in, you receive "**Error 17: Incorrect username or password**" message, then ensure you have entered the correct username and/or password.

For security reasons, we are unable to tell you if it is your username or your password which is incorrect. Our support team will not be able to resolve this as the message will only occur through human error or by using saved passwords as described below.

Saved Passwords

Generally speaking, we do not recommend that you save your passwords to your browser; as this has been known to be less secure and cause login issues. We do recognize that some companies/employees do save their passwords to browsers. With this in mind, if your password is changed, please ensure that you update the password in your browser otherwise, the browser will repeatedly attempt to complete the login fields using the old password and the login will fail.

Multiple Failed Logins

If you continue to attempt to login with an incorrect username and/or password, your account will get locked.

Additionally, if you continue trying when your account is locked you will also have your IP address blocked. Should this happen then no one on the same IP address (i.e. potentially your whole company) will be allowed to login for 15 minutes.

Please Note – Please email your account administrator with as much detail as required if you are unable to login.

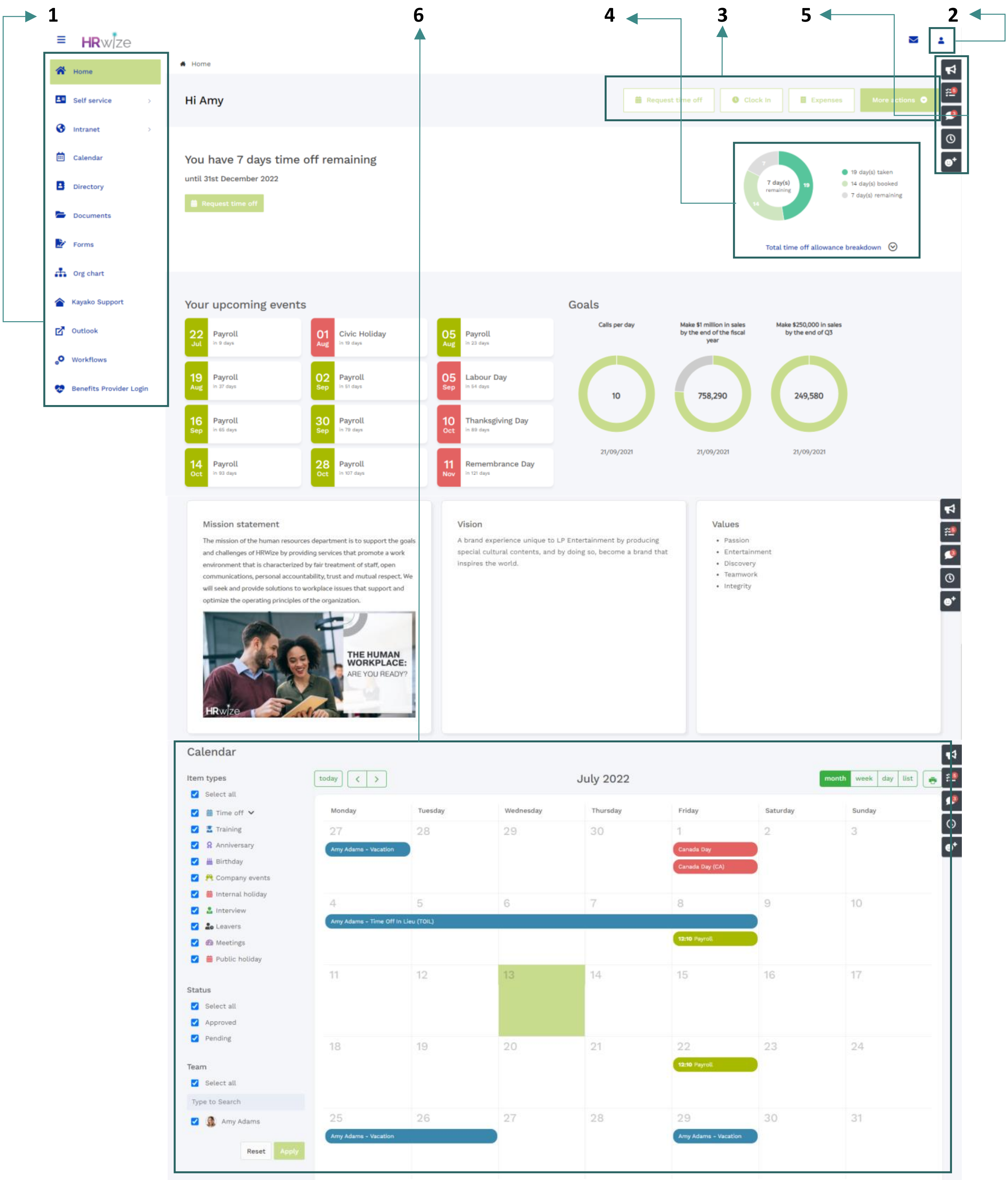
If your account or IP address does get blocked then you should wait for AT LEAST 15 minutes before trying to login again – if you try sooner, each incorrect attempt will restart the 15-minute timer again.

Forgotten Password

If you have forgotten your password you can reset it either by visiting https://login.hrwize.com/forgotten-password, and then clicking the forgotten password link on the login page or by contacting your account administrator.

If you do not login using your email address and normally login to HRWize using a username and NOT your email address (for example you login using joe.bloggs rather than joe.bloggs@hrwize.com) then you will NOT be able to reset your password using this form. In this instance, you should speak to your account administrator who can reset it for you manually.

Home Screen

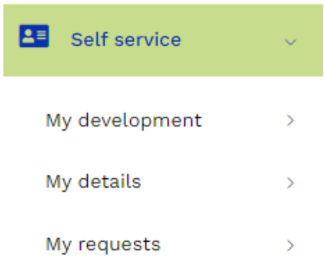

1
6
4
3
5
2
HRwize
Home
Self service
Intranet
Calendar
Directory
Documents
Forms
Org chart
Kayako Support
Outlook
Workflows
Benefits Provider Login
Hi Amy
Request time off
Clock in
Expenses
More actions
You have 7 days time off remaining
until 31st December 2022
Request time off
7 day(s) remaining
19 day(s) taken
14 day(s) booked
7 day(s) remaining
Total time off allowance breakdown
Your upcoming events
22 Jul Payroll
01 Aug Civic Holiday
05 Aug Payroll
19 Aug Payroll
02 Sep Payroll
05 Sep Labour Day
16 Sep Payroll
30 Sep Payroll
10 Oct Thanksgiving Day
14 Oct Payroll
28 Oct Payroll
11 Nov Remembrance Day
Goals
Calls per day
Make $1 million in sales by the end of the fiscal year
Make $250,000 in sales by the end of Q3
10
758,290
249,580
21/09/2021
Mission statement
The mission of the human resources department is to support the goals and challenges of HRWize by providing services that promote a work environment that is characterized by fair treatment of staff, open communications, personal accountability, trust and mutual respect. We will seek and provide solutions to workplace issues that support and optimize the operating principles of the organization.
THE HUMAN WORKPLACE:
ARE YOU READY?
Vision
A brand experience unique to LP Entertainment by producing special cultural contents, and by doing so, become a brand that inspires the world.
Values
Passion
Entertainment
Discovery
Teamwork
Integrity
Calendar
Item types
Select all
Time off
Training
Anniversary
Birthday
Company events
Internal holiday
Interview
Leavers
Meetings
Public holiday
Status
Select all
Approved
Pending
Team
Select all
Type to Search
Amy Adams
Reset
Apply
today
July 2022
month
week
day
list
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Amy Adams - Vacation
Canada Day
Canada Day (CA)
Amy Adams - Time Off In Lieu (TOIL)
12:10 Payroll

The home screen is broken up into a number of different areas:

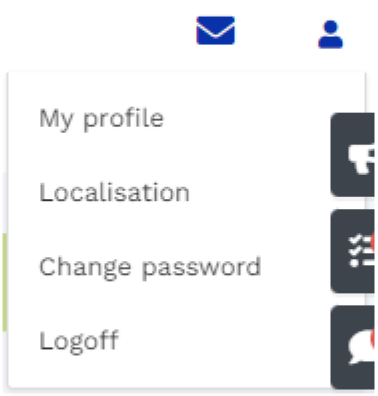
1. **Main Menu** – here you can access all the functionalities and features of your version of HRWize
2. **Profile Menu** – you can set your personalization options and change your password
3. **Quick Launch** – quickly access the main functions of the system
4. **Time-off balance** – your real-time, time-off balance
5. **Notices/Announcements/Social Stream** – things you need to do within HRWize/important announcements from your company including links to documents/collaboration and chat
6. **Calendar** – your company calendar

Self-Service Menu

The Self-service menu allows you to submit requests (e.g. Time-off, Training etc.) as well as update your personal details.



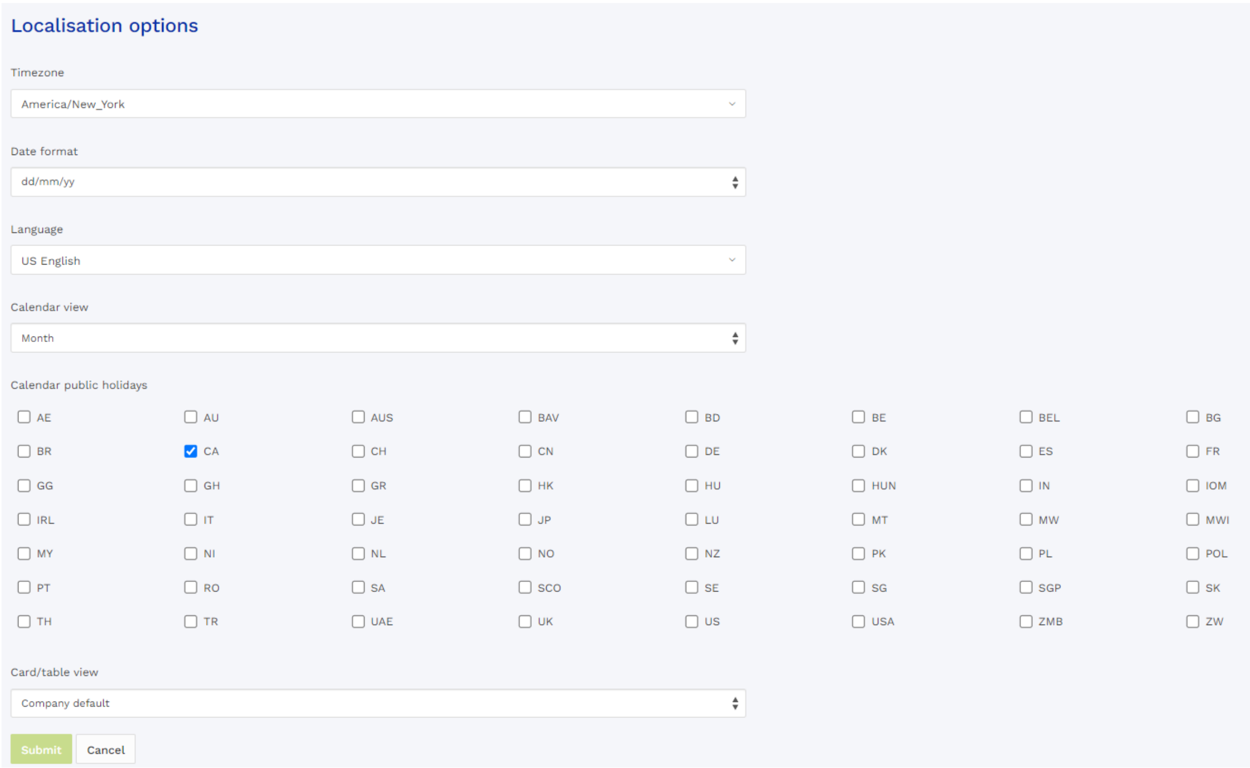
Profile Menu Image



Profile Menu (Dropdown)

Localisation

HRWize offers a variety of localization options – these are accessed under your profile menu and by then clicking **Localization**.



Within localization you can set your Time zone, Date format (dd/mm/yy, mm/dd/yy or yy/mm/dd) and additionally your language – in some cases this may just be regional variations such as French (Canada) English (Canada or US).

Change Password

To change your password, you should click the dropdown next to your name in the Profile Menu (top right corner) and click **Change password**.

If you do not change your password for 90 days, you will be required to do so on your next login.

Passwords need to be at least 8 characters long (ideally longer) and should be something which you do not use on other sites. We recommend you choose strong passwords and we prevent you from using any of 10,000 most commonly used passwords for security reasons.

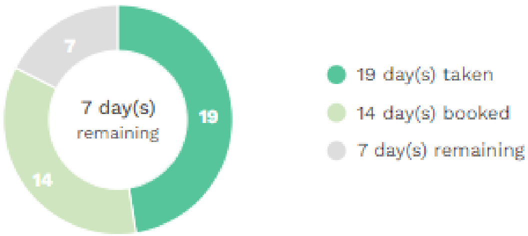
Time Off

Accessing Time Off Request

To request time off you can do one of three things:

1. Click **Request timeoff** in the **Quick launch** on the home page
2. Click **Self service** > **My requests** > **Time off** request and then click **Add**

Time Off Balance



Total time off allowance breakdown

	A	T	M	B	TB
Vacation	25	12	0	12	1
Personal Days	10	0	0	0	10
Carryover	5	0	0	0	5

With HRWize, your time off balance will be shown in the above form.

Within the graphic, there are either 3 or 4 numbers which are part of the time off balance calculations. Depending on your agreement and relevant entitlement, these numbers can either be in hours or days.

In some cases, (such as on the home screen) this will be displayed as a rollup of all your time off and in others, such as when requesting time off a particular type, it will be shown only for one specific type.

1. **Taken** – the number of days in the past which you have already taken.
2. **Mandatory** – mandatory days which you must take such as public holidays which are automatically taken from your allowance.
3. **Booked** – days in the future which you have booked but not yet taken.
4. **True Balance** – your remaining time off allowance, assuming that you take all of your booked time off.

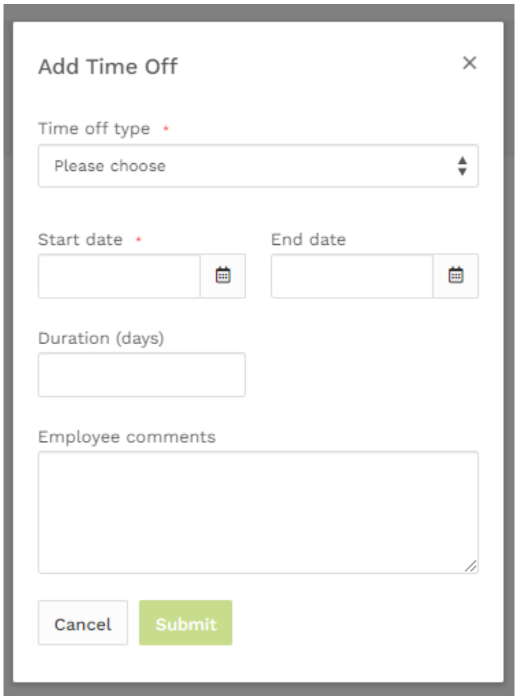
Booking Time Off

When you request time off, you will be presented with a list of the various time off types from which you can request time off.

The actual time off types themselves are different for every company.

To request time off, the first step is to click the down arrow to the right of the appropriate time off heading. This will then open an additional box(es) into which you can then add to your request.

Depending on how your company has set-up timeoff and what types they have configured there will be at least two core types; those with an allowance (such as Annual Leave for example) and those without (such as Sickness for example).



When a particular type has an allowance (above left) you will first be presented with a balance graphic showing you the particulars of this type. The terminology used is the same as outlined above.

Once you have entered the start and end date, click Calculate Duration and this will tell you how many days or hours this request consists of and then click submit.

Where a particular type has no allowance, you will be presented with form fields in which you should enter a start and end date and then optionally some comments.

In both cases, depending on how your company has configured time off types, you may have an additional box to fill in when making a request as below where you need to upload a document.

Occasionally when making a request you may get an error message or a notification.

Please Note – Errors (in red) must be rectified before submitting the request while notifications (in yellow) are informational only.

Examples of messages you may receive:

- Start and end date are required.
- Start date must be before end date.
- You do not have enough days to complete this request – you currently have X remaining
- The end date of this request is outside the allowed time period for carryover of X – please resubmit as two separate requests.
- You do not have enough X to book this request.
- There is already time booked for one or more of these dates – this is for your information only.

Email Notifications

When you submit a time off request, an email will be sent to your manager asking them to process the request and when you do so, you will get an email confirmation telling you what action they have taken.

Additionally, you can view the ten most recent actions on the home page for your requests or go to **Self service/Timeoff** request and scroll down to the table to show you all your requests and their status.

While there is some variety in the actual content of emails, emails from HRWize come from notifications@hrwize.com and the general layout is as below:

Editing and Deleting Time Off Requests

If you want to edit or delete a time off request, then the start date of the request is used to determine if you are able to do so.

If the start date for a request is in the past, you are only able to view the request and not to edit or delete the request. Should you need to edit or delete a request in the past you should speak to your manager or HR.

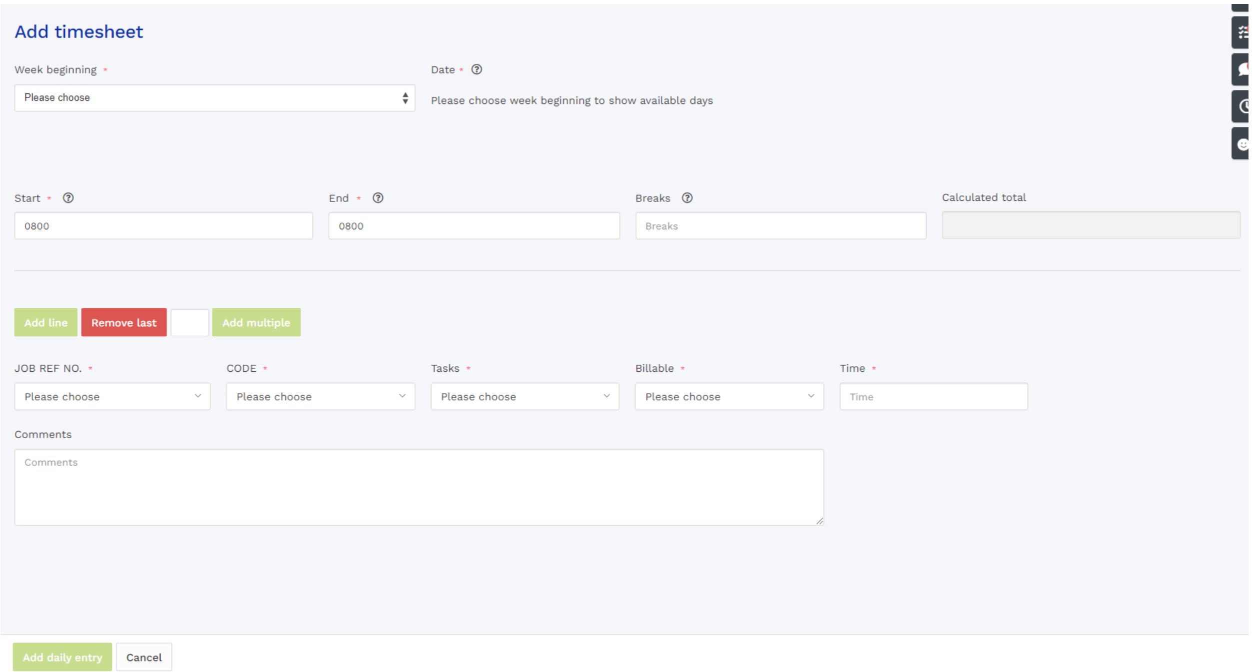
If the start date for a request is in the future, you may edit the request in which case it will be resubmitted for approval or delete the request which will trigger an email notification to your manager.

Timesheets

Adding Timesheets

To add a timesheet from the home page:

1. Click **Add** timesheet in the **Quick launch** dropdown on the home page.
2. Click **Self-service** > **My requests** > **Timesheets** and then click **Add**.



When adding a timesheet, the actual layout may be slightly different to the above image depending on your company settings. However, the actual workflow itself is the same.

1. Choose the week for which you want to submit the timesheet from the week beginning dropdown.
2. Choose the date for the timesheet (this might be in a graphical form as above or a dropdown). Please note that in the graphical layout, you can choose more than one day by using ALT and left click to select multiple days.
3. Choose a reference from the list provided or enter a reference if no drop down is provided
4. Enter a start time and end time – these need to be in HHMM format. If you use the time picker widget, then the format will automatically be correct but if you enter it manually then ensure it is correct.
5. Enter any breaks (if applicable). This should be entered in minutes.
6. Enter any comments, if applicable.
7. Click **Add** entry.

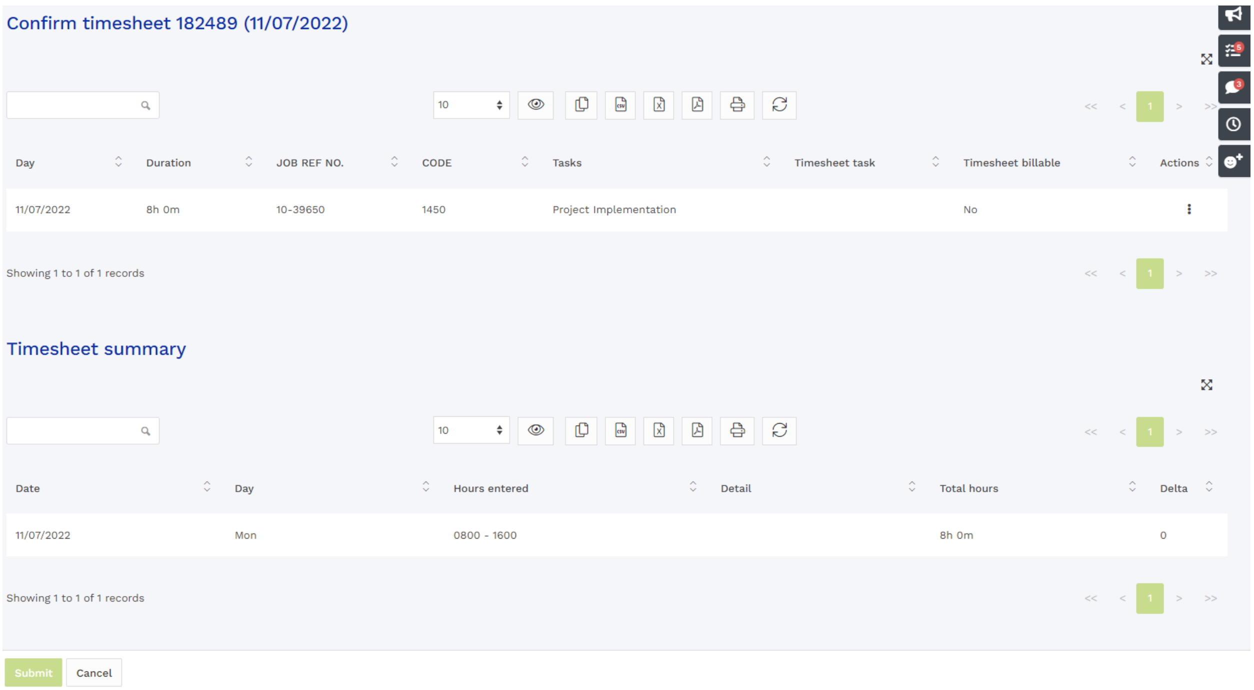
Once you have done this you have entered one entry and not yet submitted the timesheet. You could then add another line for the same day or another day until all entries are added.

Once all the entries are added, you need to click **Cancel** to go back to the **Timesheets** module where you will see a list of all your timesheets.

Any timesheets which have entries but which are not submitted will be marked as a Draft – you will then need to confirm the timesheet by clicking the **Confirm** icon in the **Actions** column (third icon along with the tick).

Please Note – If the row is highlighted in red this means the timesheet has been in draft for more than 14 days.

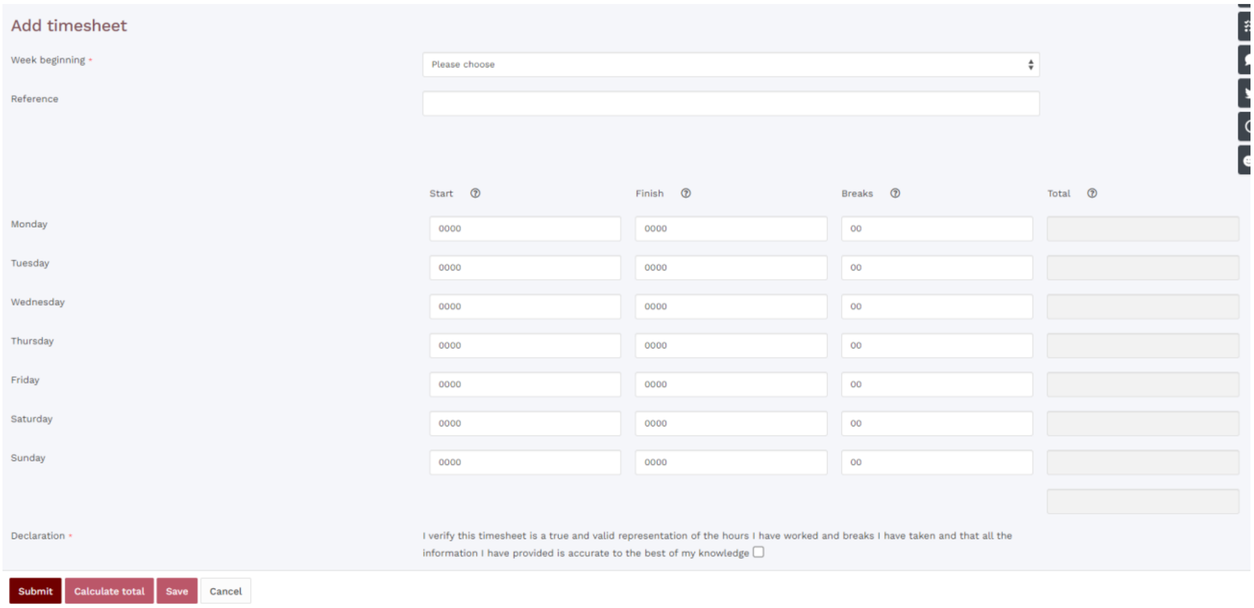
When you click on confirm you will then see a screen similar to the below:



At the top you will find a list of all your timesheets lines for this week broken down by start, end and reference and below this is a day summary of those lines.

You can then enter comments, **tick the compliance statement** and submit – at this point, your timesheet for the week has been submitted for approval.

Please Note – Simple View can be available**.** Please refer to your administrator for more information.



Add timesheet

Week beginning *

Please choose

Reference

	Start	Finish	Breaks	Total
Monday	0000	0000	00	
Tuesday	0000	0000	00	
Wednesday	0000	0000	00	
Thursday	0000	0000	00	
Friday	0000	0000	00	
Saturday	0000	0000	00	
Sunday	0000	0000	00	

Declaration *

I verify this timesheet is a true and valid representation of the hours I have worked and breaks I have taken and that all the information I have provided is accurate to the best of my knowledge

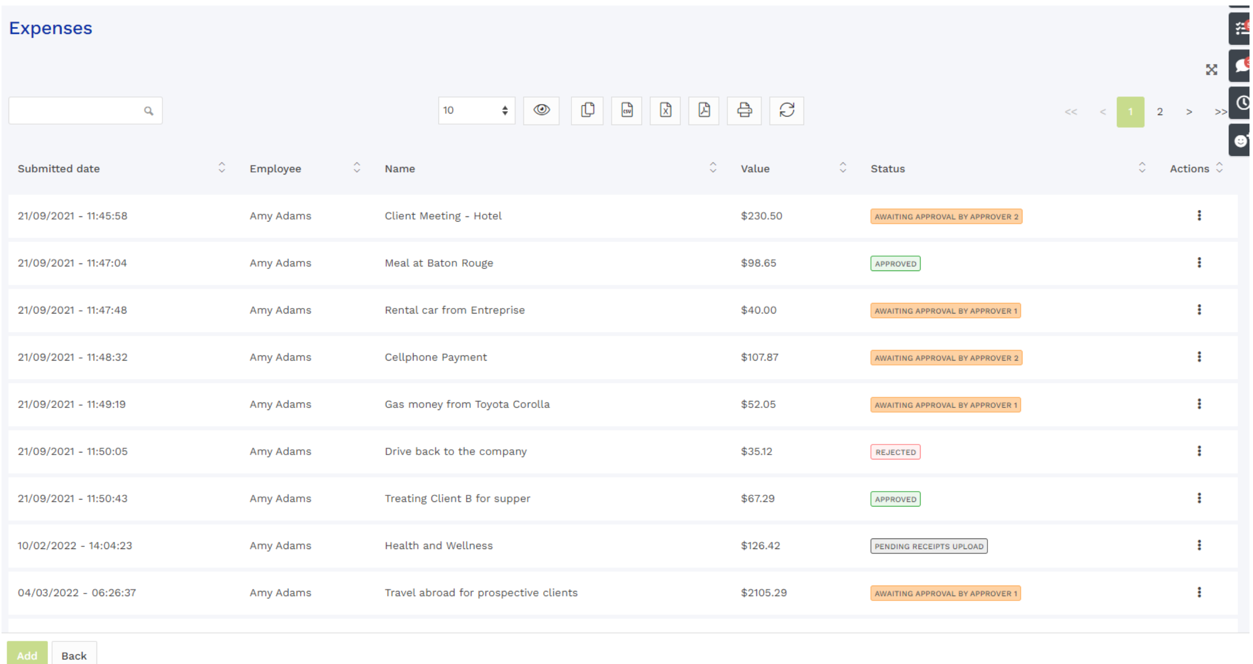
Submit | Calculate total | Save | Cancel

Expenses

Adding Expenses

To add expenses, you can do one of two things:

1. Click **Expenses** in the Quick launch on the home page.
2. Click **Self-service** > **My requests** > **Expenses** and then click **Add**.



Expenses

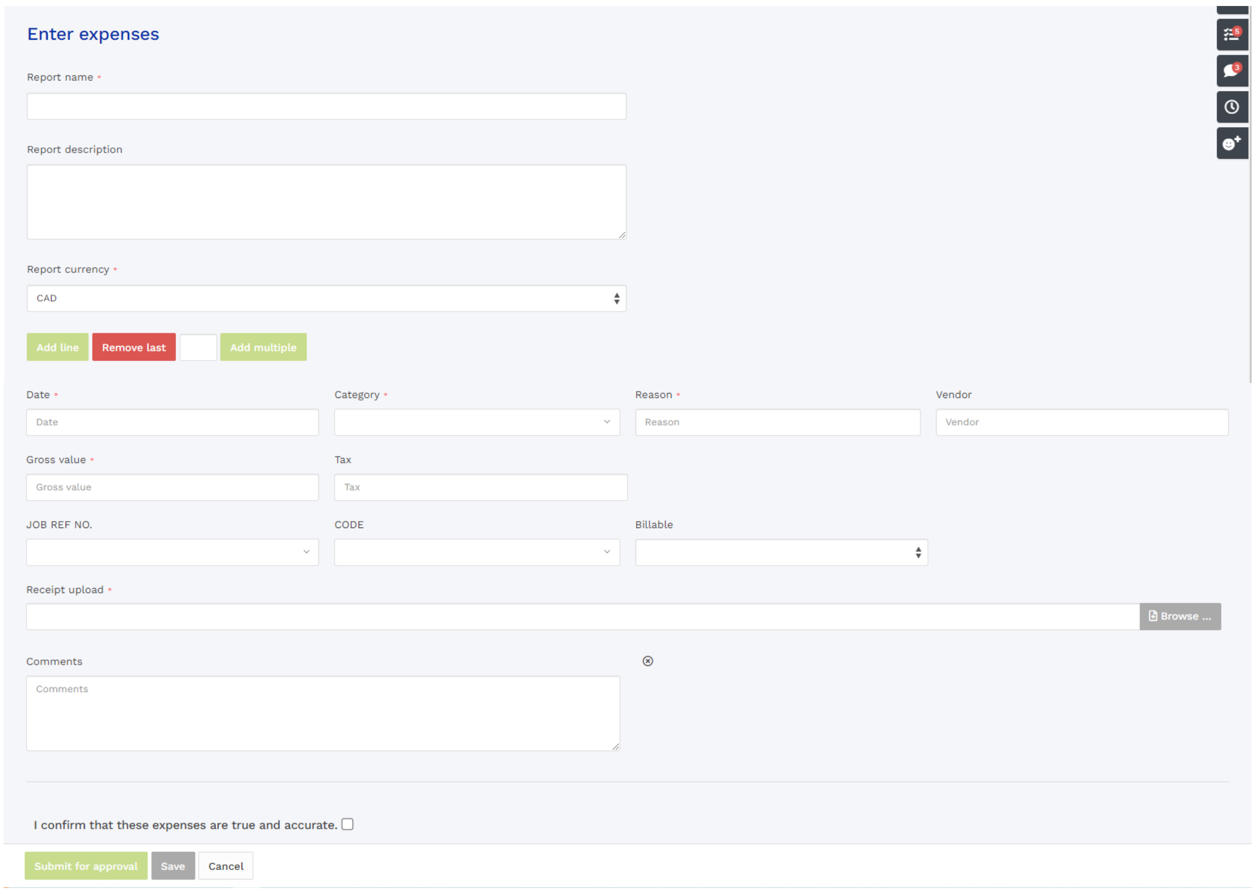
Submitted date	Employee	Name	Value	Status	Actions
21/09/2021 - 11:45:58	Amy Adams	Client Meeting - Hotel	$230.50	AWAITING APPROVAL BY APPROVER 2	
21/09/2021 - 11:47:04	Amy Adams	Meal at Baton Rouge	$98.65	APPROVED	
21/09/2021 - 11:47:48	Amy Adams	Rental car from Entreprise	$40.00	AWAITING APPROVAL BY APPROVER 1	
21/09/2021 - 11:48:32	Amy Adams	Cellphone Payment	$107.87	AWAITING APPROVAL BY APPROVER 2	
21/09/2021 - 11:49:19	Amy Adams	Gas money from Toyota Corolla	$52.05	AWAITING APPROVAL BY APPROVER 1	
21/09/2021 - 11:50:05	Amy Adams	Drive back to the company	$35.12	REJECTED	
21/09/2021 - 11:50:43	Amy Adams	Treating Client B for supper	$67.29	APPROVED	
10/02/2022 - 14:04:23	Amy Adams	Health and Wellness	$126.42	PENDING RECEIPTS UPLOAD	
04/03/2022 - 06:26:37	Amy Adams	Travel abroad for prospective clients	$2105.29	AWAITING APPROVAL BY APPROVER 1	

Add Back

Submitting a Claim

When entering, an expense claim the actual process can vary significantly depending on how your company has chosen to use the module. For the purposes of this guide, we have assumed that your company requires you to upload electronic receipts.

Please Note – If this is not the case then you can ignore the section on receipts.



When entering, an expense claim you first enter the common claim details including the report name and currency and then you add one or more lines to the claim.

To add multiple lines, you can click **Add** in the middle left of the screen which adds an additional line – the maximum lines you can have on one claim is 50. Additionally, you can delete a line using the X icon next to comments or delete the most recently added line using Remove Last.

Most of the actual boxes on the claim are self-explanatory – the only two which are worthy of mention are value and receipt.

When entering the value please do not enter any currency symbols – just enter the number itself. Also, when choosing if you have a receipt for this line or not, this does not impact your need to upload receipts.

This field is purely informational and is used to indicate if any particular line has or has not a receipt included.

Once you have entered all your lines and uploaded your receipts, you should click on **Submit for approval**.

Approval Workflow

The actual approval workflow varies according to settings, but the available options are:

Draft	You have saved the claim, but not yet submitted
Receipts are required but not yet uploaded	The claim required receipts, but you have not yet uploaded the receipts
Awating approval by approver 1	The claim has been submitted and is awaiting approval by the first approver
Awaiting approval by approver 2	The claim has been submitted and is awaiting approval by the second approver
Approved	Your claim has been approved
Rejected	Your claim has been rejected
Approved, pending payment	Your claim has been approved and is now pending payment
Paid	Your claim has been approved and marked as paid

Mileage

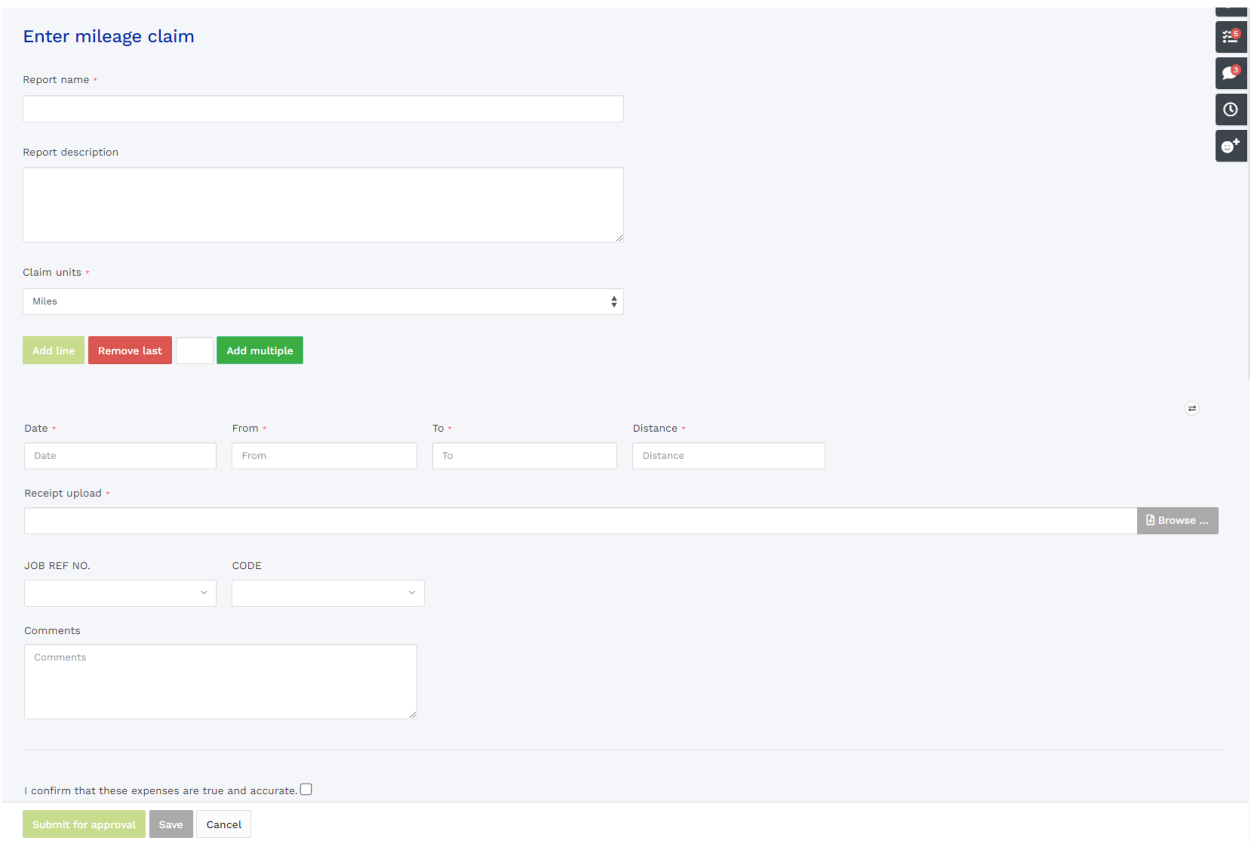
Adding Mileage

To add a mileage claim, you can do one of two things:

1. Click **Mileage** in the Quick launch on the home page
2. Click on the **Self-service** icon, **Mileage** and then click **Add**

Submitting a Claim

The workflow for mileage mirrors the workflow for expenses almost entirely. The only two exceptions are the data captured and there is no requirement to upload receipts for mileage claims.



When submitting a mileage claim, you should choose the claim unit (Miles or KM) rather than currency in expenses and enter the Date, From, To and Distance – as there is no requirement to upload receipts you can simply click **Submit for approval** once you have added all your lines and accepted the declaration.

Tables

Throughout HRWize you will encounter tables displaying data such as your time off, timesheets, expenses and so on.

All tables follow a common layout such as below:

1. At the top centre, there is a dropdown which allows you to view 10.25.50 or 100 records at a time.
2.
3. At the top left, there is a search box which will search visible data within the table and only return rows which contain the search entry.
4. Each of the columns can be sorted by clicking the column title – to reverse the sort, click the column title again.
5. At the bottom right, there is a pagination section which allows you to move to the first, previous, next or last pages or jump to a specific page by clicking the page number.
6. The actions column in the actual table shows what actions you can take against each row. The actual contents of the action column will vary according to the data type and the status of the record but commonly you can edit, delete and view many items. If you are unsure what an item in the actions column does, then hover over it for a tooltip guide.
7. At the top centre, there are also various controls to interact with the information in the table. Column visibility will allow you to toggle between viewing columns, copy will copy all the information to your clipboard, excel will export the information as a CSV. Format, PDF will export the information as a PDF. File and Rest will refresh the data in the table.
8. The small icon above the reset control will expand the table to a full screen view.

10

<< < 1 2 3 4 5 ... 22 > >>

Start date	End date	Employee name	Time off type	Submitted date	Duration	Approved	State	Comments	Actions
30/12/2022	30/12/2022	Vonnie Giacopazzi	Vacation	01/02/2022 - 08:06:16	1.00 days	APPROVED	BOOKED		⋮
30/12/2022	30/12/2022	Kareem Morrant	Vacation	01/02/2022 - 08:06:17	1.00 days	APPROVED	BOOKED		⋮
27/12/2022	27/12/2022	Corie Gilroy	Vacation	01/02/2022 - 08:06:17	1.00 days	APPROVED	BOOKED		⋮
27/12/2022	27/12/2022	Edd Karpman	Vacation	01/02/2022 - 08:06:17	1.00 days	APPROVED	BOOKED		⋮
24/12/2022	26/12/2022	Dev McCritchie	Vacation	01/02/2022 - 08:04:18	2.00 days	APPROVED	BOOKED		⋮
24/12/2022	26/12/2022	Andrej Nordass	Vacation	01/02/2022 - 08:06:16	2.00 days	APPROVED	BOOKED		⋮
17/12/2022	19/12/2022	Deina Moule	Vacation	01/02/2022 - 08:06:17	3.00 days	PENDING	BOOKED		⋮
06/12/2022	12/12/2022	Amby Folbige	Vacation	01/02/2022 - 08:06:16	7.00 days	APPROVED	BOOKED		⋮
04/12/2022	10/12/2022	Lucky Crumpe	Vacation	01/02/2022 - 08:06:17	7.00 days	APPROVED	BOOKED		⋮
22/11/2022	26/11/2022	Keith Tomlin	Vacation	01/02/2022 - 08:06:16	5.00 days	PENDING	BOOKED		⋮

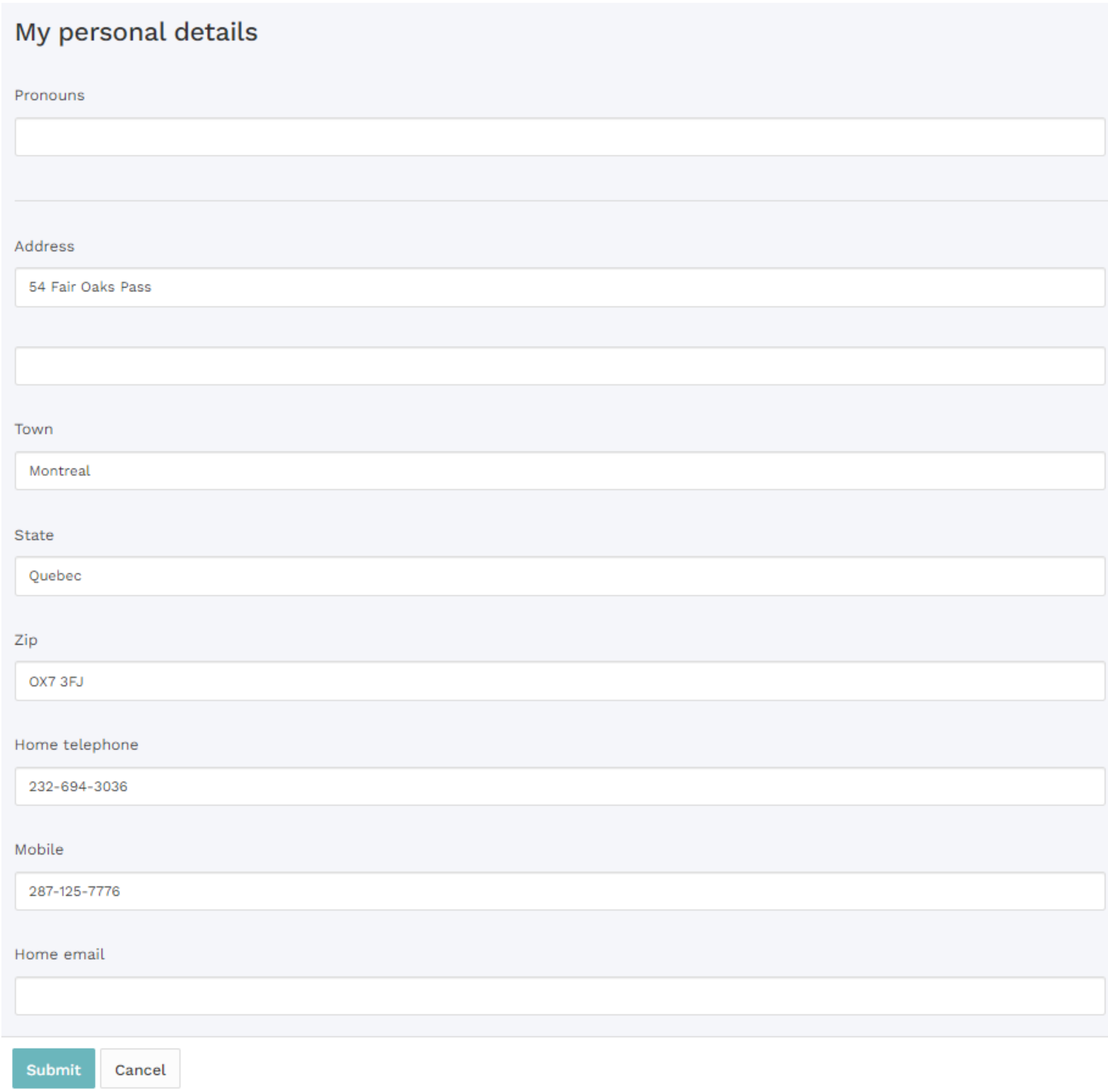
Showing 1 to 10 of 213 records

<< < 1 2 3 4 5 ... 22 > >>

HRwize

Adding and Listing Data

When adding data in HRWize, the majority of the input is via forms – in some cases, such as expenses, time-off and timesheets, the forms are tailored to your company's request but in many places the forms used are very similar to the below.



Once you have completed the contents of the form, you simply need to click **Submit** to confirm. Alternatively, you can click **Cancel** which will take you back to the parent module without saving.

Occasionally, forms will have required fields indicated by a red asterisk next to the field name – in this instance, if you try to submit a form without filling in the required field(s) you will be unable to do so and the required field(s) will be highlighted in red for your convenience. This may also happen if you try to enter text into a number field, for example.

Documents

Within HRWize there are two types of documents – **Company documents** and **Employee documents**.

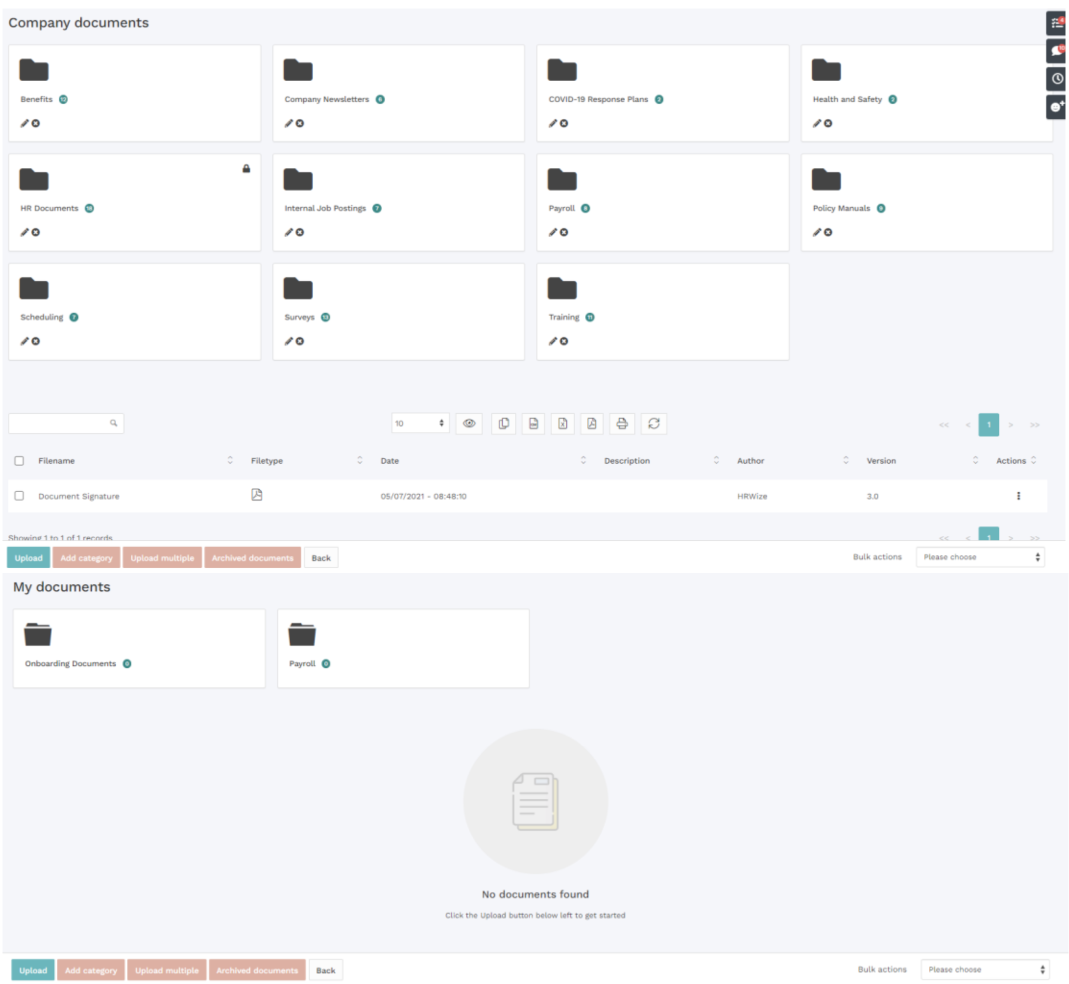
Within the document module, you will be able to see both with company documents at the top and your documents at the bottom.

In some cases, documents may be stored in folders in which case you simply need to click the folder name or icon to enter the folder.

When you wish to open a document, you have two choices indicated by the two icons – you can either download the document or view the document.

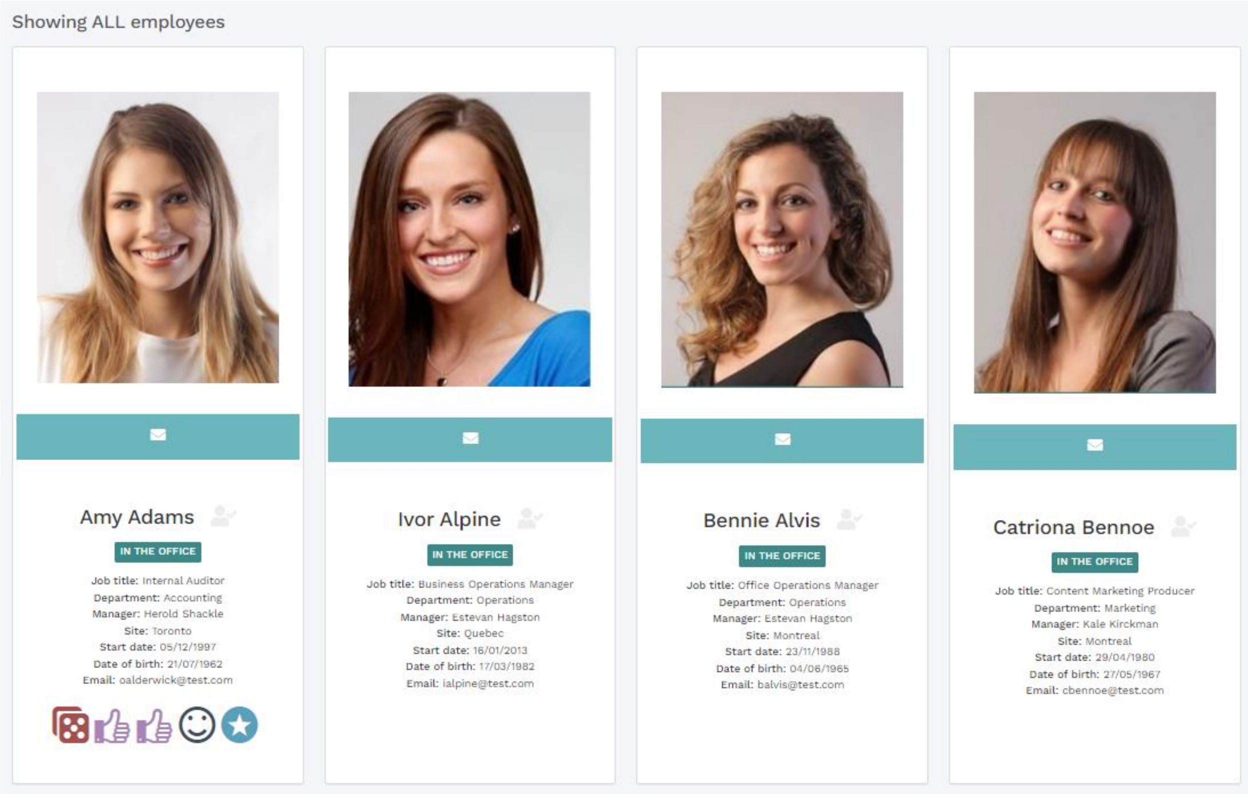
In some instances, you may choose to view a document and it may download - this is usually as your browser cannot open the particular document type such as Word documents. Additionally, you may upload employee documents using the **Upload button.**

Please Note – Uploaded documents will not be visible until approved by your manager.



Employee Directory

HRWize contains an employee directory which gives you easy access to work information about your colleagues.

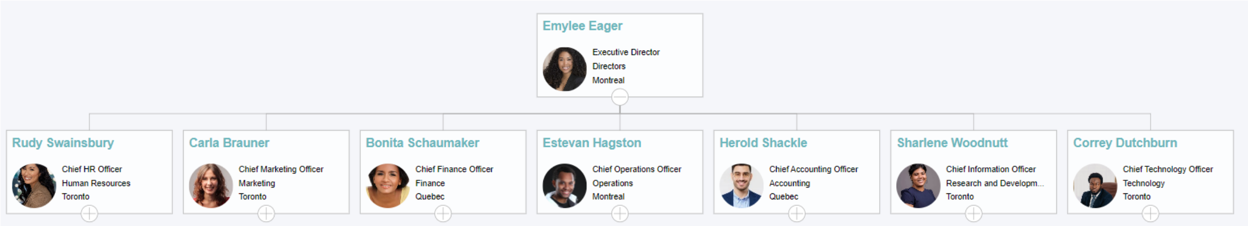


If you wish to narrow down the number of results shown on the screen you can use the filters at the top of the page to view results by: Last name initial, managers, departments and site locations.

HRwize

Organization Chart

HRWize includes a dynamically generated organization chart which displays work information on each employee along with the company structure.



Using the controls above the organization chart, you can interact with the chart in several different ways; the chart controls allow you to: search for a particular user, print the org chart, navigate the chart vertically or horizontally and zoom in or out of the chart display.