NEOS HR App

User Manual

NEOS Human Resources Pty Ltd

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1.   Logging In

To login: Go to the http://neoshrsystems.com/ home page (figure 1). Enter your username and password, then click *Log in*.

BROWSER NOTE - The following browsers are advisable in the use of this system: Google Chrome, Firefox & Safari.

Option 1: User Name and Password

- Enter the User name and Password you have been provided with and click on <log in>.

Figure 1 Log in Using User Name and Password

The **remember me** box creates cookie on the user device which will populate the user name automatically. It will not remember your password. Deselecting the box deletes the cookie immediately.

Option 2: Single Sign On (SSO0 With a Microsoft Account

- If you have an existing Microsoft account, you can use the SSO option instead of the Username/password option.

Figure 2 Log in Single Sign On

1.1 LOGIN TROUBLESHOOTING, RESETING & CHANGING PASSWORDS
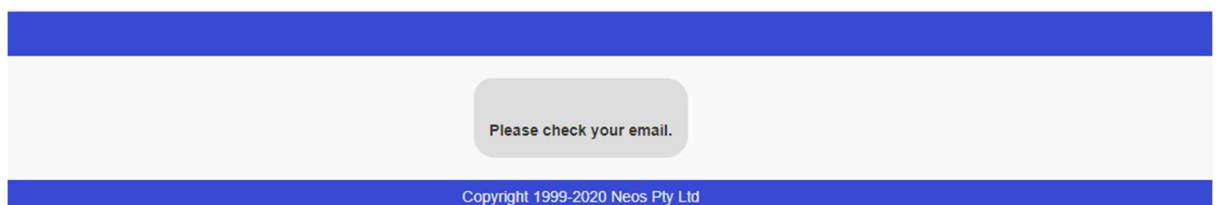
- You have 3 attempts to enter the correct password.
- If you wish to **change your password**, deliberately enter 3 incorrect passwords. The system will lock you out and send an email prompting you to reset your password (as the below steps illustrate).

- After invalid login attempts are exceeded you must reset your password. The following prompt will appear:

Figure 3 Resetting Password

After clicking on the 'Click here' hyperlink you will see the following confirmation:

Figure 4 Confirmation that reset process has cc

- Your designated email address will receive the following message prompting you to reset your password via a new link:

NEOS PASSWORD RESET

Dear Mark,

To gain access to the NEOS system please click on the link below:

http://neoshrsystem.com/access/index.php?

Regards,

NEOS Support
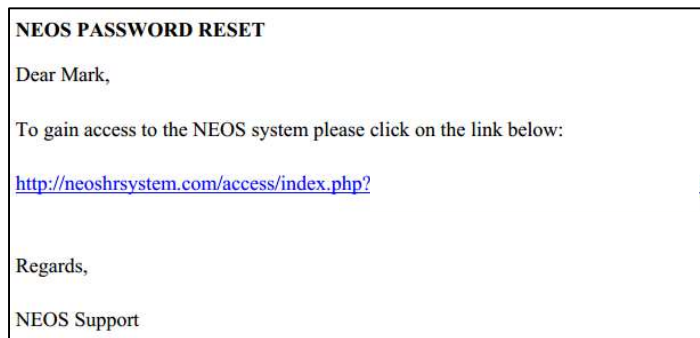
Figure 5 Email to Reset Password

- Clicking on the reset link in the email will redirect to the following screen:

Please enter a new password

Username   private@neoshr.com.au

Password

Strong
Acceptable
Not safe

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Figure 6 Resetting Your Password Screen
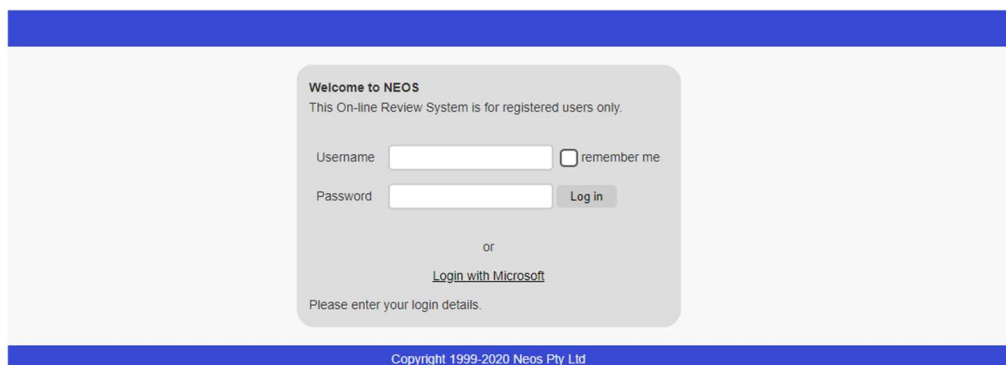
- Password strength is evaluated as you enter the new password. When the pass word is acceptable (i.e. contains at least one Upper case and one Character), the 'Change password' button will appear:

Figure 7 Example of Strong Password

- You will then be redirected to the login screen. Enter your username and new password.

Figure 8 Successful Password Reset

2.   Welcome Page

Once you have successfully logged in, the welcome page will appear (see below). The menu pane will fan out upon selecting the menu ICON ☰ MENU on the top left corner of the screen.
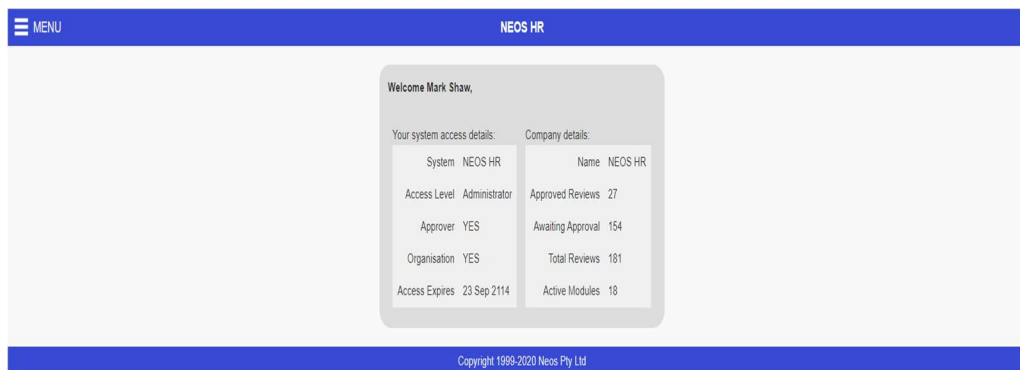
Figure 9 Home Page

System access details indicate:

- Your access level
- Your approver status
- Whether you have an organisational chart
- Your access expiry date

Company details indicate:

- Your company name
- How many of your reviews have been approved
- How many of your reviews are awaiting approval
- The total amount of reviews you have conducted
- How many active modules you have access to

3.   Menu Pane & Navigation

The menu pane allows you to navigate across the applications. You may also utilise the Search Bar featured at the top of the Menu pane to navigate, often if you already know your desired selection.
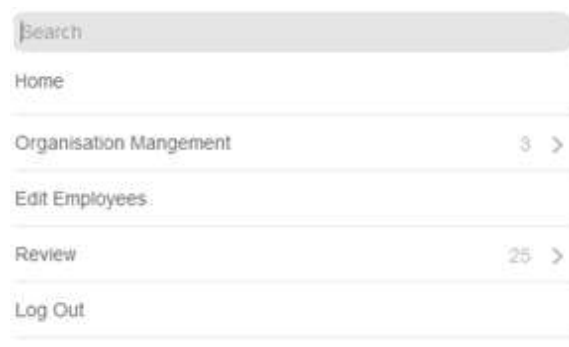
Figure 10 Menu Pane

The numbers on the right-hand side of the menu pane indicate the number of sub-items contained in each item.

> **Note:** The type of items you have on your menu pane may differ to those that appear above, depending on what your user account has access to.

System Time Out: The system will time you out after 42 mins of being inactive. The initial log in page will appear and you will have to re-enter you log in details.

To go back a screen: Click the [back] arrow on your browser.

4.   Conducting a new assessment

1. To conduct a new assessment, select 'Review' on the menu pane.
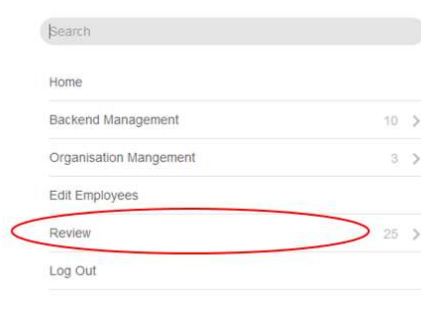
Figure 11 To Select Review Option

2. Select the desired assessment.
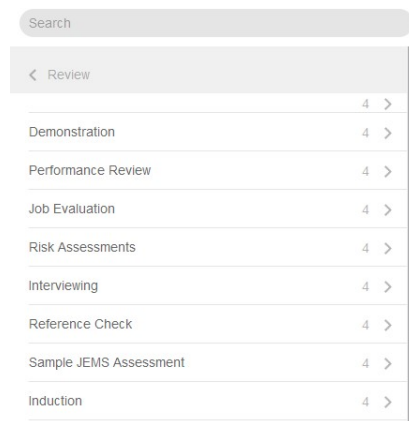
Figure 12 – List of Assessment Options

Note: Your options in Review will differ depending on which assessments your user account and licence agreement has granted access to.

3. Select 'Add New [assessment name]' to start conducting the new assessment.
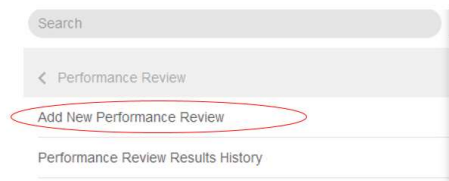
Figure 13 To Select New Assessment this example Performance Review)

Figure 14 To Select Required Option

4. A details page will appear in which you must make the relevant entries and drop-down menu selections. Click 'Submit' to proceed.

Figure 15 Details page. Performance Review Example

Note: A slight variation of the page may appear depending on the type of assessment being undertaken.

5. The Assessment will now appear:

Note: Depending on the type of assessment, the layout will differ. However generally, the key aspects of the screen are:

1. Reference details

The assessment seen above details the reference number and appropriate name and/or or identification number and stream name.

2. Category tabs

These feature below the details bar and contain the groupings of elements. Simply click the various tabs to move between categories (listed left to right).

3. Elements/Characteristics

These feature within the categories and contain multiple levels of information (typically, criteria descending or ascending in scale) for you to select. Simply click the various drop down tabs to move between the elements (listed top to bottom) and to reveal the levels.

4. Levels

Choose the most appropriate level by reading all of their descriptors and <u>clicking on the checkbox or anywhere on the Level area</u>. **A green square** (Chrome, Firefox) **OR tick** (Internet Explorer) should appear on the left of your selected level. The element name will **BOLD and turn green** to indicate a selection has been made. See an example below:

5. **To make a comment** select the Comment ICON 💬 that appears on the bottom left corner of each element. You can make comments within every element. The dialog box below should appear:

Figure 16 Adding Comments

Click '**save comments**' upon completion. These comments will be seen by the person who can approve the report and will also appear in the final reports.

The comment icon 💬 will appear against the element name to indicate your comment has been left. See below:

Figure 17 Add Comment to Specific Key Measure

7. **Complete Assessment**:

The [Store Record] ICON should appear on the bottom left corner once the assessment has been completed.

> If 'Store Record' DOES NOT appear, this indicates your assessment is incomplete and you may have missed one or more selections.
>
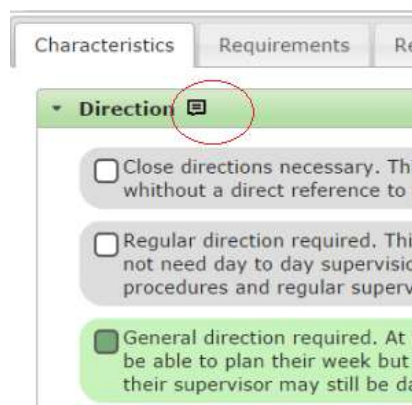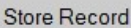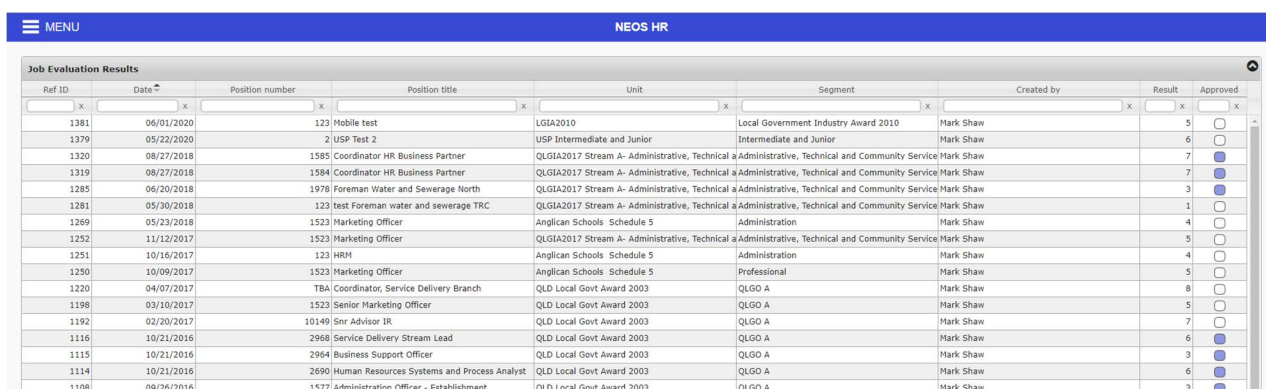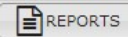> If an element name is NOT **bold OR GREEN** – this indicates a level selection has NOT been made.

8. **Report Generated**:

The screen below will appear upon the storing of a record. It is a list of all assessments made for the module. The assessment you have just completed will be the first in the list.

Ref ID	Date	Position number	Position title	Unit	Segment	Created by	Result	Approved
1381	06/01/2020	123	Mobile test	LGIA2010	Local Government Industry Award 2010	Mark Shaw	5	◯
1379	05/22/2020	2	USP Test 2	USP Intermediate and Junior	Intermediate and Junior	Mark Shaw	6	◯
1320	08/27/2018	1585	Coordinator HR Business Partner	QLGIA2017 Stream A- Administrative, Technical a	Administrative, Technical and Community Service	Mark Shaw	7	🔵
1319	08/27/2018	1584	Coordinator HR Business Partner	QLGIA2017 Stream A- Administrative, Technical a	Administrative, Technical and Community Service	Mark Shaw	7	🔵
1285	06/20/2018	1978	Foreman Water and Sewerage North	QLGIA2017 Stream A- Administrative, Technical a	Administrative, Technical and Community Service	Mark Shaw	3	🔵
1281	05/30/2018	123	test Foreman water and sewerage TRC	QLGIA2017 Stream A- Administrative, Technical a	Administrative, Technical and Community Service	Mark Shaw	1	◯
1269	05/23/2018	1523	Marketing Officer	Anglican Schools Schedule 5	Administration	Mark Shaw	4	◯
1252	11/12/2017	1523	Marketing Officer	QLGIA2017 Stream A- Administrative, Technical a	Administrative, Technical and Community Service	Mark Shaw	5	◯
1251	10/16/2017	123	HRM	Anglican Schools Schedule 5	Administration	Mark Shaw	4	◯
1250	10/09/2017	1523	Marketing Officer	Anglican Schools Schedule 5	Professional	Mark Shaw	5	◯
1220	04/07/2017	TBA	Coordinator, Service Delivery Branch	QLD Local Govt Award 2003	QLGO A	Mark Shaw	8	◯
1198	03/10/2017	1523	Senior Marketing Officer	QLD Local Govt Award 2003	QLGO A	Mark Shaw	5	◯
1192	02/20/2017	10149	Snr Advisor IR	QLD Local Govt Award 2003	QLGO A	Mark Shaw	7	◯
1116	10/21/2016	2968	Service Delivery Stream Lead	QLD Local Govt Award 2003	QLGO A	Mark Shaw	6	🔵
1115	10/21/2016	2964	Business Support Officer	QLD Local Govt Award 2003	QLGO A	Mark Shaw	3	🔵
1114	10/21/2016	2690	Human Resources Systems and Process Analyst	QLD Local Govt Award 2003	QLGO A	Mark Shaw	6	🔵
1108	09/26/2016	1577	Administration Officer - Establishment	QLD Local Govt Award 2003	QLGO A	Mark Shaw	3	🔵

Figure 18 To Print Report

1. Click the report to highlight it yellow.

2. Click [📄 REPORTS] featured on the bottom left hand side of the list.

> A dialog box will appear outlining options for different formats of the report:
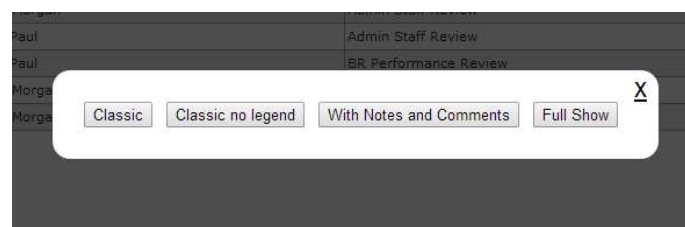

Figure 19 To Select report (Not Always Multiple Options)

Note: The options featured in the above screen shot will vary according to your licence agreement. For example if your licence agreement grants you 360 degree feedback or trend reporting options. These names (i.e. 'Trend Report') will appear in lieu of the labelled 'Classic' or 'Classic no legend' etc. options.

3. Select your report – it will download as a PDF file.

> **Note:** Reports will bear a **DRAFT** watermark if it has not yet been approved (also indicated by a white square in the 'approved' column of the list above – i.e. last column). You can only approve if you have an approver user status. See your System Administrator to clarify or change your status.
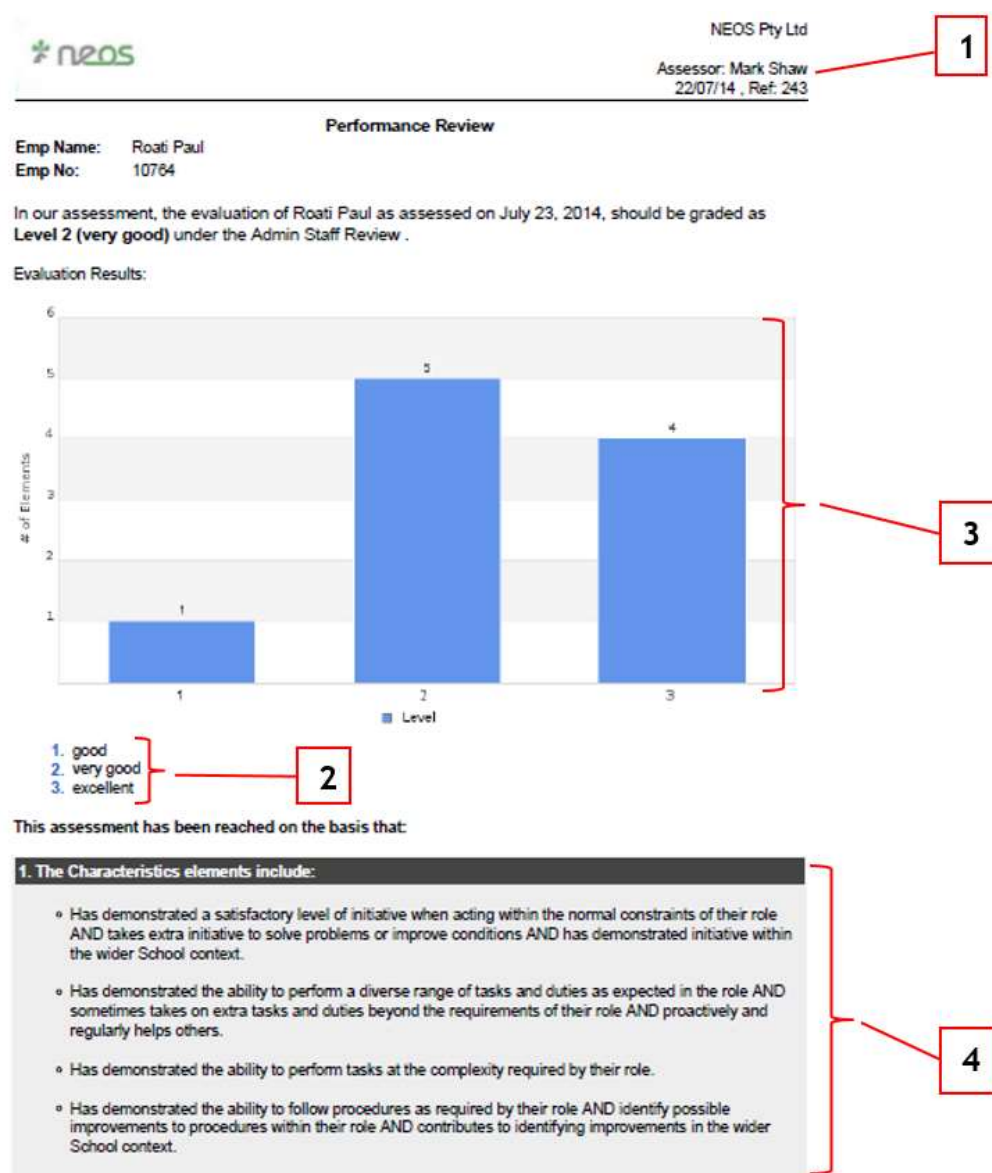
Figure 20 Sample Report. Performance Review

The figure above shows a sample report for a Performance Review.

This report contains the following detail:

1. The date the assessment was made and its unique reference number

2. A key indicating the meaning of each numbered level

3. A graph, indicating how many elements were rated at each level

4. Word descriptions of each level selected. Usually in summary form.

Nb: Any notes made by the assessor will appear report

This report can then be printed, saved under a general directory of an electronic management system or emailed. This document should be stored/processed as per your company's policies.

You may also access these reports later – see 5.1 'View Reports' p.12

5. Functions in Assessment Results

The table below summarises the different functions available from the lower menu depending on the individual user's security access level

User type	State			
	New record being created	**Record saved in Draft And Edited by User who Created record**	**Record saved in Draft And Edited by User who DID NOT Create record**	**Record Approved**
Org Super	Store record	Edit choices and comments Supervisor comment Cancel Update Delete	Cancel Delete Supervisor comment	Cancel Delete
Assessor	Store record	Edit choices and comments Supervisor comment Cancel Update	Cancel Supervisor comment	Cancel
Sub Assessor	Store record	Edit choices and comments Supervisor comment Cancel Update	Not able to access records created by other users	Cancel

Figure 21 Functionality by Security Level

5.1 To Access an Existing Record

1. From the main menu pane select 'Review'
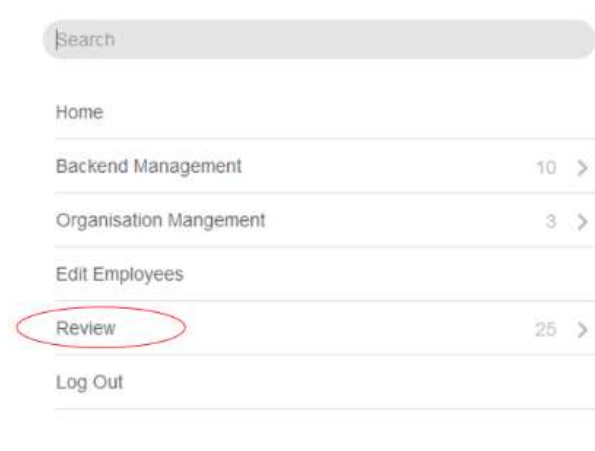
Figure 22 Select Review for Existing record

2. Select an [assessment] type

Figure 23 Select Type of Review/Assessment

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3. Select '[assessment name] Results'
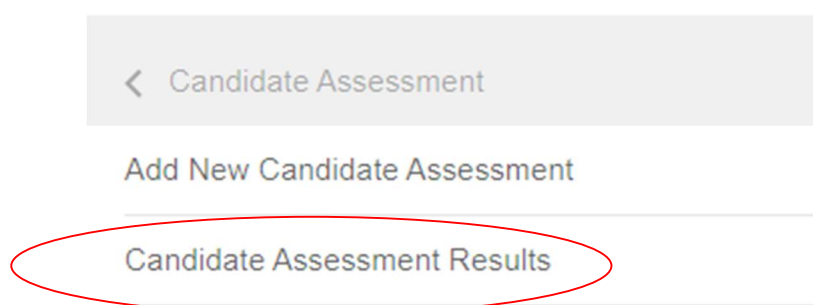
Figure 24 To Select from Existing Records

4. Figure 5(d)The screen below will appear listing all the assessments made by you and depending on your security access, you may be able to see other assessors' assessment.

Figure 25 Master List of Existing Records

5.2 To Edit or View an Existing Record

1. Complete steps in 5.1.

2. Select the assessment you wish to Edit from the available list.

Select the record to edit by clicking the desired row (once selected it should remain highlighted yellow as in Figure 5.3).

NOTE: A User can only edit a record they have created. Depending on the User's Security Level, while other users may be able to review, add a comment and/or print your record, they cannot amend your assessment choices.

Figure 26 Selected Report

3. Select the EDIT ICON ✏️

> This will take you through the assessment, enabling you to view the assessors' selections and comments.
>
> **Everytime you make a change**, a comments dialog box wil automatically appear (see below). It is at your discretion whether you leave a comment to justfy your change. You can dismiss the dialog by clicking the 'x' on the top right corner. A comment icon 💬 will appear next to the element name once a comment is left.
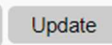
Figure 27— Optional Comment Dialog Box Upon Edit

4.   Depending on your Security Level, you can then select [Delete] or [Update] from the options from the menu at the bottom of the screen – Figure 5.3(c)

Figure 28 –Edit Options (Subject to security Levels)

5.3 To Add a Supervisor Comment

1. Complete steps in 5.1.

2. Select the assessment you wish to add your comment to from the available list.

Select the record to edit by clicking the desired row (once selected it should remain highlighted yellow as in Figure 5.4(a).

NOTE: Depending on the User's Security Level, you may be restricted to records you can add a comment to.
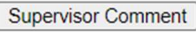

Figure 29 Selected Report

3. Click on the [Supervisor Comment] option from the menu at the bottom of the screen – Figure 5.4(b)

Figure 30 To Add or Edit a Supervisor Comment

4. Click on the Supervsior Commnet Icon [Supervisor Comment]

   Add you comment in the comments box and clickl on <Save Comments>. You comments arer now saved an dyou can click on tehj <cancel> icon to return to the records list..
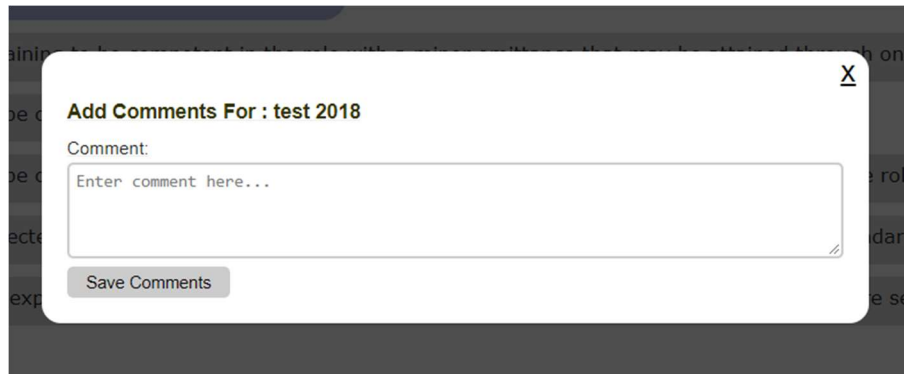

Figure 31 Supervisor Comment Dialog Box

1. To Edit an existing Supervisor Comment, follow steps 5.5 1 to 5 and your changes will be updated

2. To Delete an existing Supervisor Comment, follow steps 5.5 1 to 5. At Step 5 delete all existing comments and <save Comments> This will delete your existing comments

Note: Multlle users can add comments. Each comment is added based on the user cretingteh comment. Only the user who creates a comment can edit or delet that comment.

4.   Select

   (a)   Cancel to return to the main menu
   (b)   Approve to lock the record
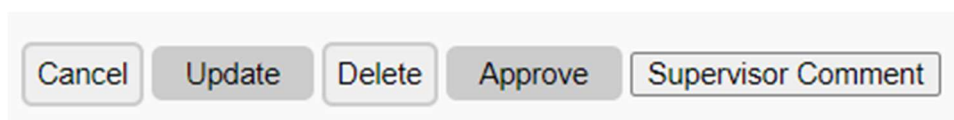   (c)   Delete to permanently delete the record (once a record is deleted, it cannot be recovered.)

Figure 32 Edit Options (Subject to Security Levels)

5.4. To Print a report

1. Complete steps in 5.1.

2. Click the report to highlight it yellow. You may filter the results according to the filter options featured on the top rows.

3. Select the Reports ICON [REPORTS] . A dialog box (Figure 5.2) will appear containing the report options. (see 4.8 for more information re: Report)
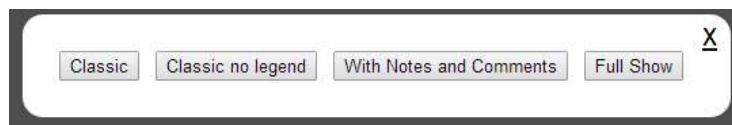

| Classic | Classic no legend | With Notes and Comments | Full Show |

Figure 33 Report Options (Often only 1 option available)

This will generate the report in PDF format. From here you may print the report as per your settings.

     Note: The options featured in Figure 5.2 will vary according to your licence agreement.

     The type of security access will also limit records available to you to review and print..
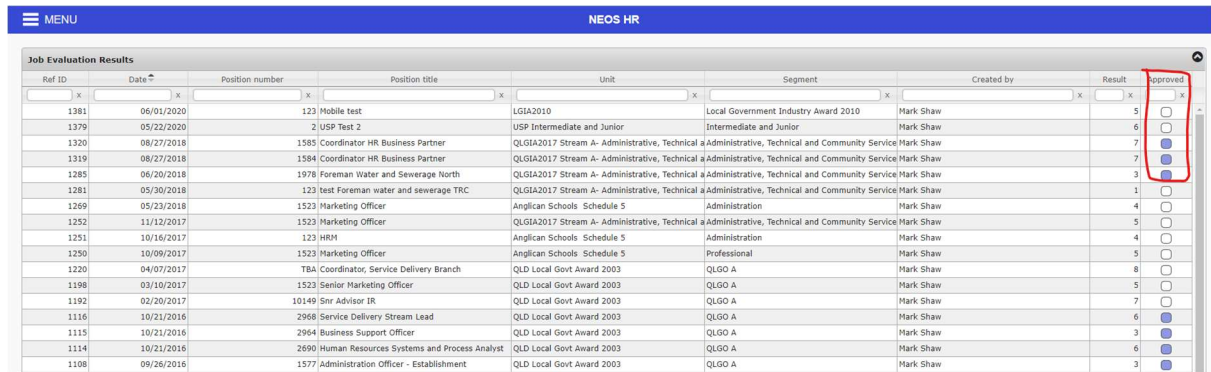
4. Select a report – it will download as a PDF file.

Note: Reports will bear a **DRAFT** watermark if it has not yet been approved (also indicated by a white square in the 'approved' column of the list – i.e last column). You can only approve if you have an approver user status (see 5.3 below).

5.5. To Export the results list into an Excel spreadsheet

This function allows you to export the <u>list of assessments</u> that appear on the results screen

1.   Complete steps in 5.0 until the list of records appears

Figure 34 Draft v Approved Record Indicator

**Figure 5.5 (a) – Master list of records**

2.   Click the Export ICON on the bottom left side of the screen. Data is exported to a file called in a file called exportdata.xml.
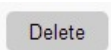

Figure 35 Export Records Icon

Figure 5.5 (b) – Export Records Icon

3.   Open a Microsoft Excel then select <Open>. Select the exportdata.xml file and the data will open in Excel.

5.6 To Delete a Record

NOTE: A Users with Org Super Security Level can delete a record.

Once deleted, the record is permanently deleted and cannot be recovered.

1. **Complete steps 5.0**

2. **Select** the assessment you wish to edit by clicking the desired row (once selected it should remain highlighted yellow).

3. **Select** the EDIT ICON ✏️

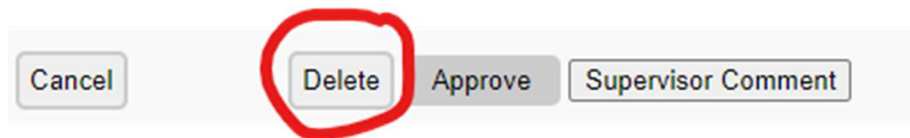4. Click [Delete] from the menu at the bottom of the screen

Figure 36 To Delete a Record

5. Confirm you wish to delete the record.

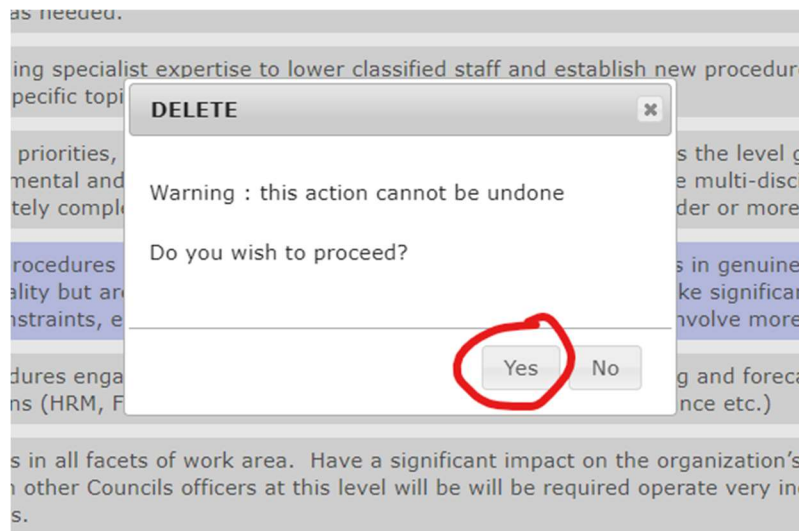REMINDER: Record will be permanently deleted and cannot be recovered

Figure 37 Confirm Deletion of Record

6.   Support & Password assistance

Initially, all support calls to:

Neos Pty Ltd: Phone: 07 3333 1921

Email: admin@neoshr.com.au

RE: FORGOTTEN / EXPIRED PASSWORDS or LOGIN LOCK OUT

- See Chapter 1.1 of this manual to reset your password