OfficeControl

www.office-control.co.uk

# Administrator Guide

Online Absence management

Version 1.002

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# Introduction

Welcome to the Office Control user guide.

Office Control has been designed to give your business greater control over your absences, both planned and unplanned. It does this by improving communications between employees and managers, accurately recording better information, consistently implementing company absence policies and closely monitoring absence levels.

We hope you enjoy using and benefiting from Office Control for many years to come.

## *System Requirements*

Being a web based system, to use Office Control requires an internet connection and a compatible browser such as Microsoft Internet Explorer or Mozilla Firefox.

# General Information

## *Registration*

In order to use Office Control you must first register your company. Once you have registered, you will be sent your password to be used in conjunction with your email address as the user name. This account will be the principal user and have access rights to all areas of the system.

NOTE: Every email address added must be unique.

## *Accounts Information*

We require your company's accounts email from the point of registration. This is not needed until you purchase licenses. If you do not finish the trial your details will be deleted from the system 60 days after the expiry of the trial and no contact with your accounts department will be made.

## *Licenses*

Once registered the 20 day free trial will start. The trial allows for up to 20 users to be added. This limit does include the principal user but not the accounts email.

The first time you buy licenses the system will replace the 20 initial licenses with the purchased ones. After that any further licenses bought will be added to the existing number.

After purchasing user licenses, an invoice will be emailed to the accounts email address that you gave during registration. Office Control is purchased by annual subscription and the next and subsequent invoices will be sent 60 days prior to the anniversary of your initial purchase.

If you require additional licenses throughout the year, the remainder of the year will be invoiced for. For instance, if there is 6 months left to run before the anniversary date and a purchase for 14 further user licenses is made, Office Control will invoice for 14 * £10 * 6/12 or £70. In reality the remainder of the year is calculated to the nearest day. At the next anniversary date, the new total number of users will be invoiced for the following year's subscription.

## *Access and security*

Access is made by a unique username and password combination. Usernames are their email address, and an email address can only be registered once with Office Control. Passwords are generated automatically; however they can be changed in the Employee details.

It is important that Employees' usernames and passwords are kept safe at all times. As with similar systems, such as online personal banking a username and password will allow access into the owners account.

Office Control also automatically discontinues your session (or log you out) after a few minutes of inactivity. On returning to use Office Control, logging in will be required.

The data is stored behind state-of-the-art firewalls, with username, password and IP restricted remote access in an extremely secure built environment.

For more information regarding our commitment to keeping your company and employee data safe and secure, please read our Privacy Policy.

# Initial Set up

There are a few tasks to do prior to using Office Control, even during the trial. This list gives general information about the task. For a more detailed explanation of the tasks involved, see the highlighted page number, later in the guide.

We recommend completing the tasks in the following order:

Go to *User Control*

1. Go to *Company Details (Page 14)*
   a. Check the address and contact details are correct
   b. Add all of your D*epartments*
   c. Change the *Absence settings* to suit your company's policies
   Go to *User Control*
2. Go to *Work Periods in User Control (Page 16)*
   a. The current and next years periods are already set as 01/01/xx to 31/12/xx. If this is not correct make the appropriate changes. We recommend that you add as many periods forward as you want to allow employees to book ahead. Note: each period added will need to have the corresponding bank holidays added prior to any leave requested. [Back]
3. Go to *Leave Patterns (Page 14)*
   a. The Monday – Friday work pattern is already added. If your company has any other work pattern (such as for part time staff) then add it here.
   b. Add the Bank Holidays that your company follows for the *work periods* that are added.
   c. Add any forced leave periods that any or all employees are expected to take, i.e. Christmas
   [Back]
4. Go to *Users (Page 15)*
   a. Select [New User], complete the information and add the user. Do this for each employee. We recommend that you add employees starting with Directors and follow the management path down. A welcome email will be sent to each employee added, informing them of their log in details. We strongly recommend adding a number of employees when trialling the system in order to evaluate the interconnectivity of the system.
   [Back]
5. Office Control is now ready to use.

# Permissions

The permissions within Office Control are controlled in two ways; by relationships and by assignment.

## *Relationships*

These are the hierarchical position the employee falls with in the company. By expressing who their manager and assistant are gives them and the expressed employees varying degrees of access to their leave details and sickness/injury information.

Managers can do the following for those that they manage

- Managers can request and authorise leave
- Managers can cancel past and future leave
- Managers can notify a sickness period
- Managers can complete return to work interviews/Doctors Notes
- Managers can complete adverse injury reports

Assistants can do the following for those that they assist, and the employees who are managed by the assisted.

- Assistants can request leave
- Assistants can notify a sickness period
- Assistants can cancel future leave

Everyone can do the following for themselves

- Everyone can request leave
- Everyone can notify a sickness period
- Everyone can cancel future leave
- Everyone can complete a self certification for a sick period

## *Assigned*

Assigned permissions are part of the employee setup and offer more detailed control over what the employee is able to do. Role models can be added for quickly choosing different levels of access. Office Control already has the following role models added: Employee, Manager, Assistant and Principal.

- **Can Request Leave**
  - Used in cases where a central person or department manage the requesting and approval of all leave, the employee can still access the system to view only

- **Can Authorise Leave**
  - MUST be switched on for managers to approve leave

- **Can self authorise leave**
  - Used where employees/Directors self manage their leave entitlement and approval
- **Can notify for anybody**
  - Enables an employee with no specific relationship to another employee to accept a notification of sickness on their behalf e.g. reception, HR, personnel manager
- **Change Company Details**
  - Enables access to review and update the company address, contact details, accounts contact information and assign an employee as principal.
- **Add or Remove Departments**
  - Enables access to add or remove departments or groups
- **Edit Leave Policy**
  - Enables access to add or edit leave policies
- **View All Policies**
  - Enables access to view leave policies
- **Edit Work Period**
  - Enables access to add or edit work periods
- **View All Work Periods**
  - Enables access to view work periods
- **Edit Work Pattern**
  - Enables access to view, add or edit work patterns
- **Edit Employees**
  - Enables access to view employees details such as password, permissions and leave entitlement (Shows only those with a relationship)
- **View Employees**
  - View list of employees (Shows only those with a relationship)
- **View All Users Leave**
  - Enables ability to view leave for those that the employee has a relationship with
- **View Every User in the Company**
  - Overrides edit and view employees to show all employees added
- **Can Produce Risk Assessments**
  - Enables access to risk assessment area in adverse injury forms
- **Can View All Relevant Adverse Injuries**
  - Enables access to view employees injuries list (Shows only those with a relationship)

- **Can Edit an Adverse Injury**
    - Enables access to edit employees injuries details (Shows only those with a relationship)

- **Can Buy Licenses**
    - Enables access to purchase additional user licenses for Office Control

- **Can edit user permissions**
    - When editing an employees details, enables access to the employees permissions and the role model selection

- **Can alter a users leave allowance**
- When editing an employees details, enables access to the area to add or remove days for a particular work period

# Tasks

## *Log in*

Open a compatible browser such as Microsoft Internet Explorer and navigate to Office Control at http://www.office-control.co.uk. From here, add your user name and password in the fields provided and click [Login].

If you have forgotten your password, click the 'Forgotten your password?' link and follow the instructions. You will be email your password in a few minutes.

## *Annual Leave*

### Request Leave

*Go to Holiday > Request Leave*

Select the start and finish date, the type of leave and who the leave is for and click [Request].

The start and finish dates of the leave should encompass all dates of leave. It is unnecessary to manually allow for bank holidays, weekends etc as Office Control will do this automatically.

Half days can also be selected for the first and/or last day of the leave. For a one day period of leave only 1 half day should be selected either for morning or afternoon.

A reason for the leave request can be added. This would be useful to show, for instance why the leave was requested at such short notice, perhaps conflicting with an alert policy.

The request will be added to the list of leave requests for the user and an email confirming the leave request will be sent to the users email account. Another email will be sent to their manager requesting authorization for the leave.

If the request falls over leave already booked a message will appear asking for the user to select different dates.

If the leave request conflicts with an enforced absence policy the leave will not be allowed to be requested.

## Checking previous leave

*Go to Holiday > Leave already booked*

This area shows all leave requested for the employee who is currently logged in; a personal record of all leave requests and their status.

The leave here will cover the current and future leave periods. Any leave in previous periods will disappear from view, but still be available to report on.

By clicking on the either start or finish date will open the request form for the leave. This show the absence type and reason for the leave.

The cancel the leave click '*remove*'.

Employees can cancel future leave but not current and past. Managers can cancel all leave for the employees they manage but only future for themselves. Self authorising users can cancel all leave for themselves.

The status of leave can be Approved, Cancelled, Awaiting Approval, Denied and In Review. In Review is the status for leave that Awaiting Approval and has conflicted with a leave policy set to alert.

## Reviewing Leave

*Go to Holiday > Review Leave*

This area shows all leave requested for all those managed by the employee who is currently logged in.

The area is split into 2 sections.

The top section shows leave awaiting approval. The leave record shows who the leave is for, the dates and the status. The status can be Awaiting Approval and In Review.

If In Review is set in the status, so *X Policy Conflicts* will be visible. This link will highlight the number of alert policies that have been conflicted with. The link will take the user to a list of the policies that have been conflicted so that the manager can make an informed decision for authorisation.

The *details* link takes the user to a details page for the leave requested, showing leave type and any specified reasons.

After the *details* link are the *Approve* and *deny* links. These links authorise the leave and send an email to the requester informing them of the decision.

The bottom section shows leave approved for all managed users and themselves.

## Sick Leave

Sick leave in Office Control can include any leave that is unplanned, e.g. sick leave or parental leave.

The duration of unplanned absence periods, such as sick leave, are calculated including any standard day off (e.g. weekends).

The actions required after a period of unplanned absence (e.g. Doctor Note) depend on the number of days absent. These number of days before n action is required are configurable in *User Control > Company details > Absence settings section*. The self certification is always required to confirm the absence on the employee returning to work and the injury at work can be used when the absence is due to an accident at work.

### How to notify sickness

The notification of sick leave depends on the sickness policy of the company. The notification of a sickness can be added by the following person:

- The absent employee
- Their manager
- Their assistant
- Someone with 'Notification for all users' permission (e.g. Reception, HR, Office Manager)

*Go to Illness/Injury > Sick Leave > [New Illness]*

This area allows any unplanned absence to be recorded. The start date, return date, reason and person for which the unplanned absence refers can be inputted here.

After inputting these details the save button should be clicked (without checking the 'Has returned to work' box) which will save the information and set the employee as away from work. This should be done at the beginning of the absence period as soon as it is known that the employee is going to be absent.

After the absence period has been notified an email will be sent to the employee and their manager informing them of the impending absence.

If adding a sickness in retrospect simply ensure the 'Has returned to work' box is checked before saving the absence. Normally this would be done once the employee has returned to work.

If any of the details of the absence change (such as the expected return date) the notification can be accessed by clicking the start date of the absence in the list of absences below.

Once the employee has returned from the absence, open the absence and check the 'Has returned to work' box. This will finish the notification for this period of absence.

### Self Certification

Self certification is required for all periods of absence. It is here that the period of absence; dates and reasons for absence are confirmed, usually by the returning employee.

An outstanding self certification is marked as required and done when complete. To enable further editing of the record click save. To finalize the certification and prevent further editing click finish.

The manager can leave comments about this absence at the bottom of the form. These comments are visible to all users with access (i.e. the employee).

### Return to work Interview

If the absence duration extends for a configurable length of time, then a return to work interview is required. If return to work interviews are always required, set this trigger to 1 day (*User Control* > *Company details* > *Absence settings section*).

If a Return to work interview is outstanding, required will show next to the absence, otherwise it will be blank. Done replaces required when the interview has been completed.

The return to work interview is structured to find out if the employees absence are the result of any problems the employee may be facing that the company can help resolve. To this end a place to record the problems and proposed solutions are available.

A future review can be planned to determine the success of the solution for all parties. Both the employee and the manager will receive emails to confirm the date of the review. The manager's email will include the pertinent information from the interview.

### Doctors Note

If the absence duration extends for a configurable length of time, then a Doctors Note is required. If Doctors Note is always required, set this trigger to 1 day (*User Control* > *Company details* > *Absence settings section*).

If a Doctors Note is outstanding, required will show next to the absence, otherwise it will be blank. Done replaces required when the Doctors Note has been completed.

The doctors note section offers a place to transcribe the original doctor's note, including name, address, date seen and any specific notes about the illness or injury.

### Work Related Injury

This area can be used to record the details of that event that caused the absence and help towards the prevention in the future. This could be events such as a tripping, poisoning, lifting or stress etc.

Initially the record asks whether the absence is Work Related? When clicked this changes to 'details' and opens the injury form. This area collects information bout the injury such as when and where it occurred, and the actions before, during and after the injury.

For further information see *Injuries and Risk Assessment*

## *Injuries and Risk Assessment*

Injuries at work can also be recorded on Office Control when they do not relate to a specific absence.

*Go to Illness/Injury >Injuries and Risk Assessment > [Report Injury]*

The following information can be collected:

- What happened, where it happened, why it happened and when it happened
- Who were the main people involved and how where they injured
- Future prevention and risk assessment matrix
- Witness statements
- Other information (e.g. police involvement, property/equipment damage)

To report an employee as absent due to the injury, complete the 'People involved' section and click the [Report a person on sick leave] button. This will then go to the sick leave notification area.

# Reports

## *Absence Summary*

*User Control > Absence Summary*

This report shows the specified employees for the specified period and shows all specified types of absence that fall in that period. The report can show additional information such as lost time and the Bradford factor (a concise way of highlighting employees with more unplanned absence than others).

## *Alert Summary*

*User Control > Alert Summary*

For each unplanned absence, Office Control reviews previous absences over a predetermined period and counts the number of incidents and days of absence that fall with in that period. If this number reaches or exceeds the company's preferred maximum a count will increment against that user to highlight the fact. These settings are configurable in *User Control > Company details > Absence settings section.*

This report shows all users and their current counts. Employees are ordered by incidents count, then number of days absent and then alphabetically. By doing this, the employees at the top of the list with counts have more absence than the company would prefer. Note: Office Control considers more incidents to be of a greater threat to business productivity than more days. This way long term sick will not feature significantly on the list.

## *Absence List*

*User Control > Absence List*

This report shows all absence for the specified employees over the specified period in a list format.

# Management

## *Company details*

*User Control > Company details*

- Company contact information
- Principal user assignment
- Departments
- Request more user licenses
- Absence settings

## *Leave patterns*

*User Control > Leave Patterns*

Leave patterns is used to add dates that are not worked. This could be weekends, bank holidays or religious festivals (e.g. Christmas).

To add a new leave pattern, select the [New Leave Pattern] button. Now type the name of the leave pattern (e.g. Monday to Friday), select the repeat pattern of 'weekly' and select a Saturday and Sunday. Click [Save].

To assign a leave pattern to a selection of employees, click 'assign to employees' and select the employees this pattern refers to.

If a pattern is added that counts against the annul leave entitlement select the 'Taken from annual leave entitlement' check box. This might be the case for the dates between Christmas and New Year.

For leave dates that fall on the same date, the repeat annually option can be used. For dates that occur on varying dates, the one-off (no repeat) option should be used and each date should be added annually.

## Users

*User Control > Users*

To add a new user click [New User]. Complete the section and click [next]. Select the appropriate permission or use the Role model drop down to select a predetermined configuration and click [next]. Select the work pattern(s) for the new user and click [next]. If the user is being added mid way through the year, add here the entitlement days that have already been used and taken previously. It is good practice to re-book the leave that occurs in the future so that the dates for the coming leave are collected. Click [next]. Click [Finish]. The new employee has been added.

To edit an existing user click their name. The employee's name, email, manager, assistant and department are available to be changed as required. Furthermore changes to the current annual leave entitlement can also be edited by clicking [Add leave adjustment]. Changes to the employees' permissions can be changed by clicking the link at the bottom of the page, Assign permissions.

## Leave policies

*User Control > Leave Policies*

Leave policies can be added to assist in the management of annual leave. Predefined policies can be added and configured in multiple combinations to ensure specific situations do not occur. The available policies are:

- Employee Constrained
  - Selected employees can not take leave at the same time
- Department Constrained
  - Maximum number of employees allowed to take leave at the same time
- Time Constrain Employees
  - Selected employees can not take leave during a specified period
- Time Constrain Departments
  - Selected departments can not take leave during a specified period
- Maximum time allowed
  - Maximum length of leave allowed (only annual leave or all types of planned leave)
- Minimum notice required
  - Minimum notice period from leave request to start of leave
- Company minimum staffing levels
  - Minimum number of staff expected at work at any time

These policies can be set to enforce, where the employee will be informed that the request conflicts with a policy and immediately denied or alert, where the request continues to the employees' manager and informs them of the conflict(s).

## *Work periods*

*User Control > Work Periods*

The work periods are the periods that the leave entitlement refer to (e.g. January xxxx to December xxxx). On registering Office Control automatically adds the current and following years, assuming a January to December period. To change these dates select the start or finish dates for each record. To remove and start again click remove.

A work period record must be in place before leave can be booked during that time. It is sensible to add periods as far forward as you wish to allow employees to book leave. Note: Corresponding leave patterns for bank holidays, free days etc should be added for each work period added.

# Appendix

## *Contact details*


**Postal address**
8 Vaughan Parade
Torquay
Devon
TQ2 5EG
UK

**Web site**
http://www.office-control.co.uk

**Support Information**
Support 1: 0845 225 3006
Support 2: 0845 055 0730

support@kalesoftware.co.uk

**Other**
Fax: 0845 225 3007

info@office-control.co.uk
accounts@ office-control.co.uk

**Blog**
http://officecontrol.blogspot.com