

Introduction

The SP SMB HR application is designed with two audiences in mind, the HR department staff and all other employees which included managers and all other end users. The core processing of the SP SMB HR application is to capture, track and manage HR service requests (or tickets), automate service request status communications with the employee, and to manage employee data, certifications, and department policies and documents.

SP SMB HR: Staff Portal

Service Request Management

Click **Service Requests** tile **A**. to view or edit all requests, and to create a new request.

View Service Requests

1. Click **Service Requests** tile to see all requests in queue and sort as desired
2. Click the drop-down arrow at the top, right corner to see additional views
3. Click **My Assigned Requests** from this list of views to see all your requests
4. Click **Unassigned** to see all unassigned requests, or view this section on the Dashboard

Create New Service Request

1. Click **Service Requests** tile to see all requests in queue
2. Click **+ New**
3. Fill out required and optional fields
4. Click the **Save** button

Assign, Close or Edit Service Request

1. Click **All Service Requests** tile to see all requests in queue and sort as desired
2. Open desired request by selecting the request, then clicking on the **Edit** icon
3. Click **Detailed-Status** tab to assign request
4. Click **Detailed-Status** tab to close request:
 - 3. Resolved** means dept staff has completed their work to solve issue and is awaiting employee confirmation of resolution;
 - 4. Closed** means all work is completed and issue is confirmed to be resolved



- A:** Service Requests
- B:** Employee Mgt
- C:** Hiring
- D:** Staff



Employee Data Management

To manage employee data, click **B: Employee Mgt** menu item to perform the following functions.

Employee Records

Click **Employee Records** menu or **Employee Records** tile to view and manage all employees in the Employee list

Record Updates

Click **Records Updates** menu item to see the data changes that have been submitted by employees

Employee Changes

Click **Employee Changes** menu item to see the changes that managers have submitted for their employees, such as title and salary changes

Employee Documents

Click **Employee Documents** menu item or **Employee Documents** tile to view and manage the employee documents library

Certifications

Click **Certifications** menu item to manage the certifications or trainings that are due for employees

Benefit Plans

Click **Benefit Plans** menu item or to add the benefit plans available for employees to view

Benefit Selected

Click **Benefit Plans** menu item or to enter which benefit plans employees have signed up for

Performance Reviews

Click **Performance Reviews** menu item to see the performance reviews that managers have uploaded for their employees

Manage Hiring Process

To manage the hiring process, click **C: Hiring** menu item to perform the following functions.

Job Reqs

Click **Job Reqs** menu to view and manage all open job requisitions

Applicants

Click **Applicants** menu to view and add applicants and their resumes

Candidates

Click **Candidates** menu to view and manage all candidates that have been selected from the Applicants list (Status changed to **4. Selected**)

Resumes

Click **Resumes** menu to view and manage resumes uploaded for all applicants

Onboard - Offboard

Click **Onboard - Offboard** menu to manage all onboards and offboards; use the Admin – Onboard checklists to enter the tasks for these onboards/offboards

New Hire Portal

Click **New Hire Portal** menu to open the New Hire Portal; manage the content appearing on this portal on the Admin – Application page

Other Staff Portal Functions

D. Team Collaboration

From the **Staff** menu item select:

- **My Workspace** to see everything assigned/related to you as an HR staff person
- **Calendar** to manage the dept team calendar

- **Documents** for the HR staff document library
- **Links** to add resource links for the team
- **Tasks** for task management

E. Portal Content

From the **Dept Resources** menu select **Portal Content** to manage the news, announcements and events appearing on the end user Employee Portal and Staff Portal

F. Knowledgebase

Click the **Knowledgebase** tile or menu item under **Dept Resources** to manage the KB articles

G. Contacts

Click the **Contacts** menu item to enter HR contacts you wish to save

H. HR policies

Click the **HR Policies** menu item to upload HR policy documents

I. Form Templates

Click the **Form Templates** menu item to upload HR form/documents

J. Employee Time Off Requests

Click the **Time Off Calendar**, **Time Off Requests** or **Time Off Data** menu items to manage the time off requests submitted by employees

Intranet

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J: Time Off Requests