




Administrative
staff management
for **HR administrators**

1 WHAT IS IT USED FOR?

The Staff administration module contains the employee table. Here I can:

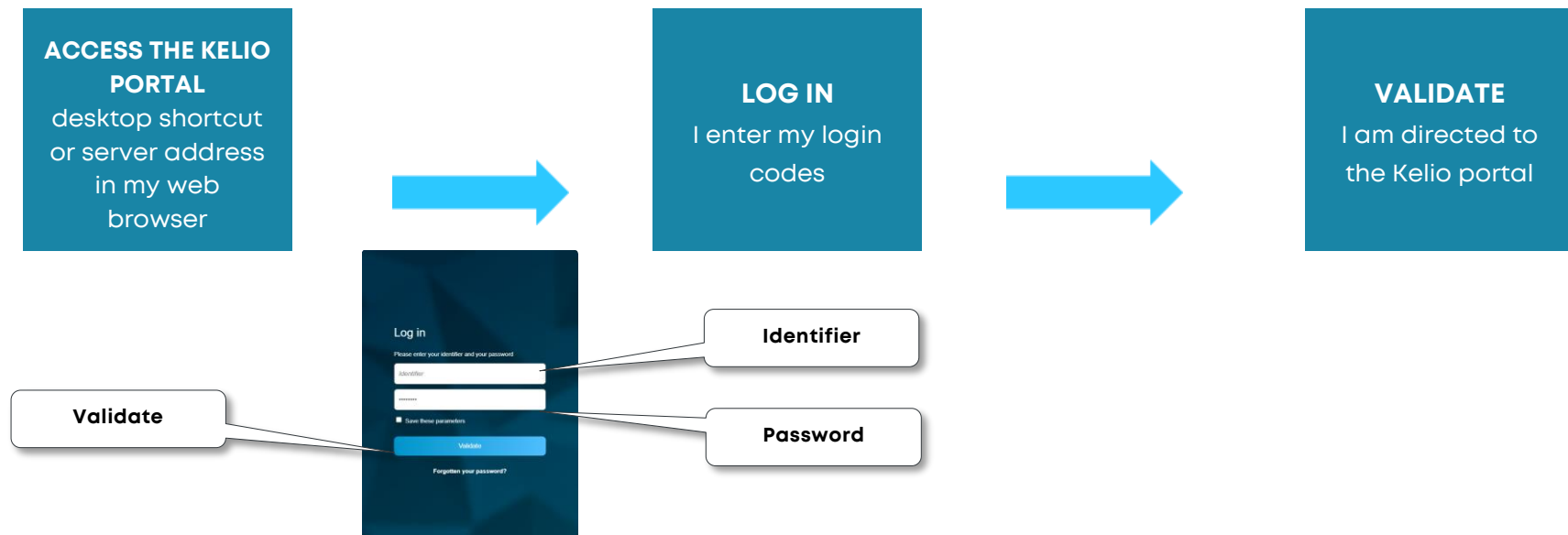
- create or configure their profiles (professional data, PPE, contracts)
- manage their certifications and medical check-ups*
- organise tasks out of HR processes*



There is a gateway with the Time & Activities and Planning module (sales option) that allows me to open my employees' files from these modules.

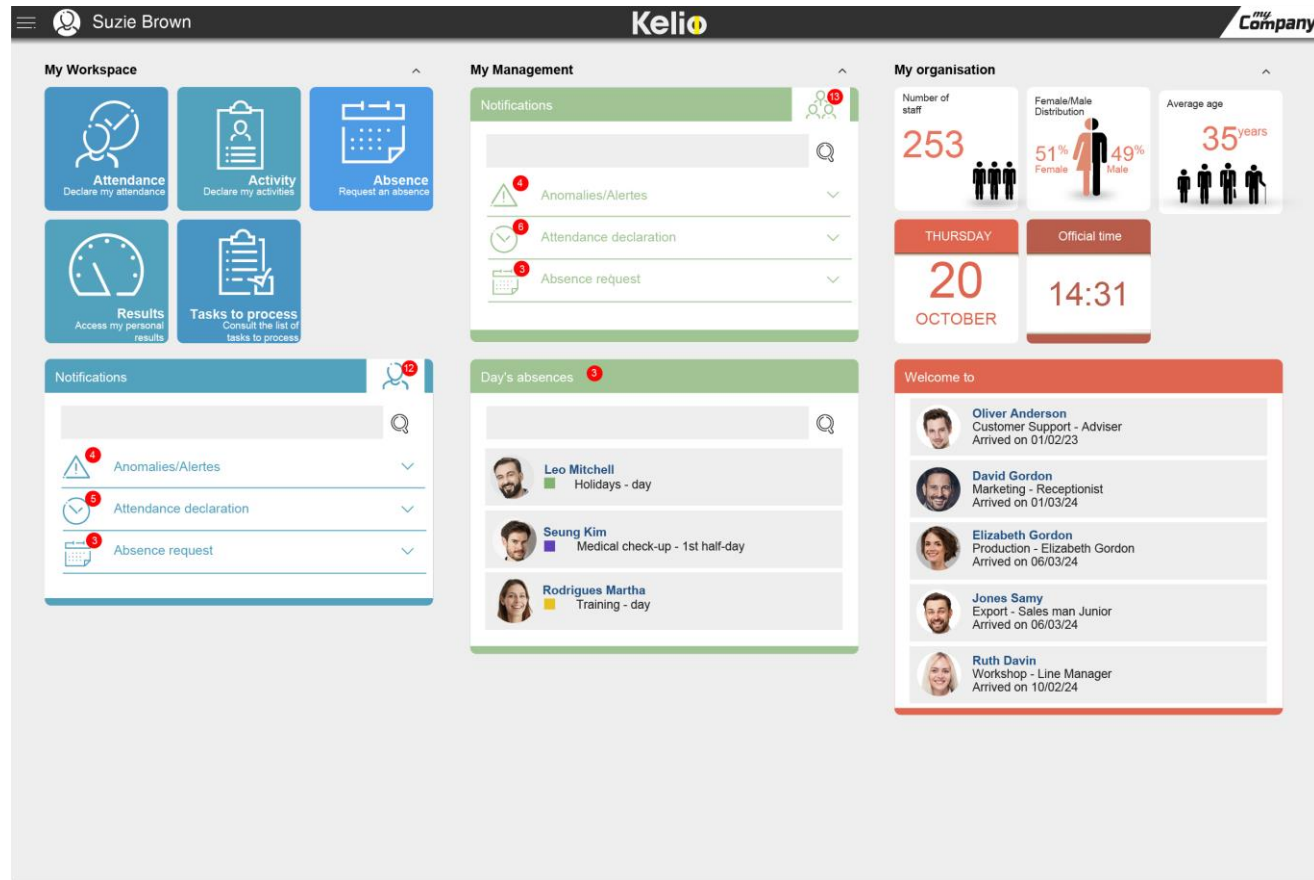
2 LOG IN

Access to the portal is controlled by the user's login and password. All modules and suggested features depend on individual user rights



* Option

3 ACCESS THE KELIO SOFTWARE PORTAL



This portal provides you with access to the different software modules.

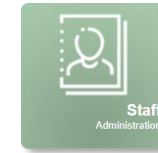
- available on all devices
- fully customisable
- with real-time indicators
- and a to-do list

Two portals are suggested by default, according to your user profile - employee or manager/administrator.
A high level of personalisation is possible!

4 ACCESS THE EMPLOYEE FILES

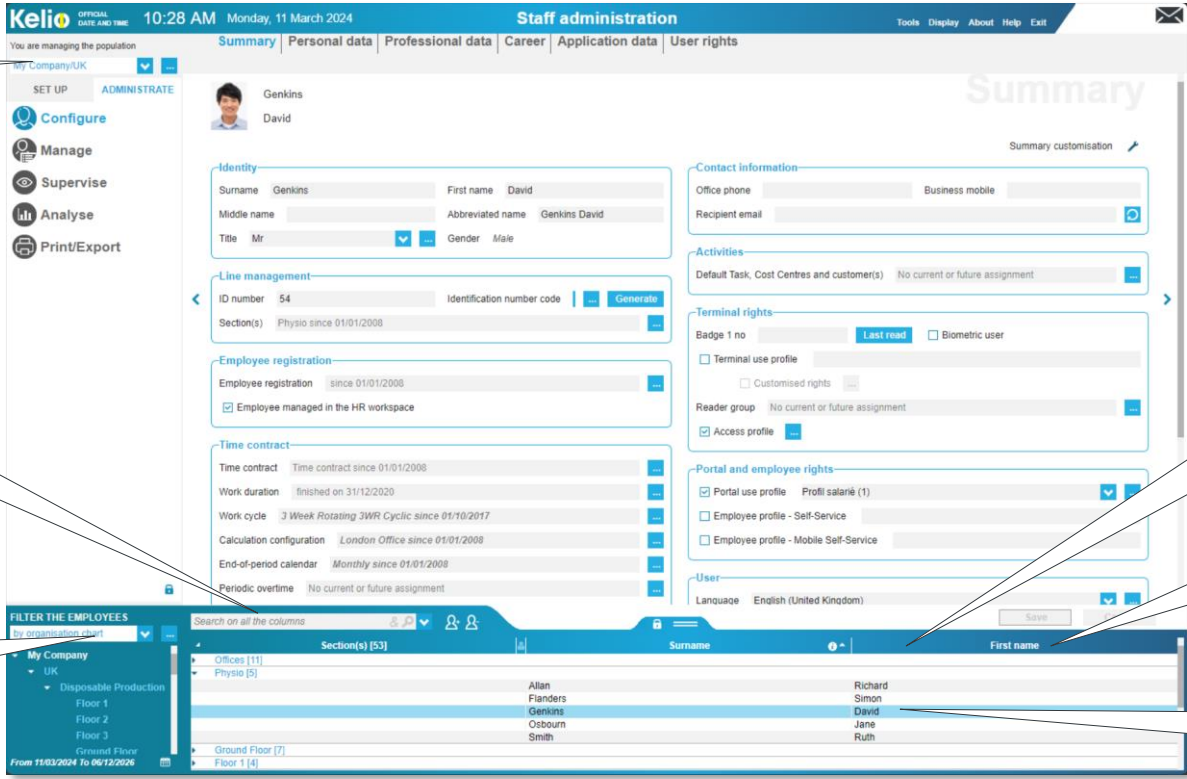
1 I select the Staff administration module by clicking on the tile or going through the navigation menu

 **Administrator workspace > Staff administration.**



2 The list of employees opens (in most cases, it is already set up for my account)

3 I can refine the filter by selecting:



The population

An employee whose name begins with a certain letter

The section, the work cycle, etc.

Add other columns with data from the employee file


Sort the column by clicking on the header

Group the table elements

The screenshot shows the Kelio Staff administration interface. The top navigation bar includes 'Tools', 'Display', 'About', 'Help', and 'Exit'. The main content area is titled 'Staff administration' and contains a 'Summary' tab and a 'Filter the employees' section. The 'Filter the employees' section includes a search bar and a table with columns for 'Section(s)', 'Surname', and 'First name'. The table lists employees: Allan Flanders, Richard Simon, Jenkins David, Osbourn Jane, and Smith Ruth. The 'Jenkins David' row is highlighted. Callouts point to various features: 'The population' points to the 'You are managing the population' text; 'An employee whose name begins with a certain letter' points to the search bar; 'The section, the work cycle, etc.' points to the 'Filter the employees' section; 'Add other columns with data from the employee file' points to the 'Add' button in the table header; 'Sort the column by clicking on the header' points to the 'Surname' header; and 'Group the table elements' points to the 'Jenkins David' row.

5 CREATE A NEW EMPLOYEE

An employee can be created from any screen in the *Administrate* section.

1 I can create a new employee file by clicking . Then:

- I either start with an empty file,
- or I duplicate an existing file.

2 I enter the **application** data:
registration date, surname and first name, ID number, the section and so on

3 I enter the **user rights**:

- I assign them a rights profile on the portal corresponding to their status (future employee, employee, manager, etc.)

With the **T&A** or **T&A PRO** option

- if he/she clocks, I activate the clocking rights in the *Terminal rights* and select the employee profile
- if the system is used to manage leave and absences, I limit the access to the Employee/Mobile Self-Service. I add the name of the absence validators and so on.

6 EMPLOYEE FILE (CONFIGURE)

Summary: Here I can consult and change the main information about the employee (such as his/her email address for receiving notifications)

Personal data: information about identity, family, means of transport, health

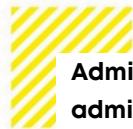
Professional data: general information about the employee and his job (line managers, PPE, medical appointments, etc.)

Career: for the *Employment contract*, I enter the type and nature of the contract (open-ended, temporary, etc.), in the other sections, data relating to qualifications and appraisals

Application data: for the *Time contract*, in addition to any previously saved elements, I add the accounts needed to calculate his/her working time and I assign a control profile (determines the anomalies that may be detected by the system); I assign the employees to the public holiday calendar of their region

User rights: rights assignment

- User: login and password, language
- Portal rights: selection of the customised portal (manager or employee)
- Terminal rights: (see above)
- Rights on Employee Self-Service/Mobile Self-Service: as an employee or manager. Validator rights, if the person must be asked to validate absences and/or attendances. If applicable, indicate the higher level validators (who will intervene to confirm or cancel the actions of the agent or the person who will replace the employee in his absence).
- HR rights: administration rights on Staff administration, Time & Activities, Setup and Planning



Administration rights are usually assigned to HR and section managers. They can extend to the Staff administration, Time & Activities, Setup, User rights, Planning, Access control and Employee Self-Service modules.

- Access rights: rights on access management
- Rights on collaborative tools: rights on the suggestions box and survey applications

7 HR PROCESS* (MANAGE)

I want to track the progress of my various tasks such as pre-, on- or off-boarding and act on them.

- 1 I open the process monitoring by going to **Scheduled processes** ①. I can see the status ② and the progress ③ for each ongoing task.
- 2 I choose one or several people and click on + to add a new process ④. I enter the effective date and eventually an option for starting the task.
- 3 I run the process. It changes to **Planned** status.

I can group processes together.

HR process	Surname/First name	Effective date	Previewed start date	Previewed end date	Actual end date	Detail	Status	Progress
Crossboarding [5]	EMPLOYEE 11	13/04/2023 16:06	12/04/2023 16:06	13/04/2023 16:06			In progress	0 / 3
	EMPLOYEE 65	24/03/2023 00:00	23/03/2023 09:00	23/03/2023 17:00	02/01/2024 11:26		Finished	3 / 3
	EMPLOYEE 67	22/12/2024 13:48	20/12/2024 07:30	20/12/2024 17:00			Planned	0 / 3
	EMPLOYEE 3	17/02/2023 16:21	16/02/2023 16:21	17/02/2023 16:21			In progress	1 / 3
	EMPLOYEE 9	22/02/2023 16:05	21/02/2023 16:05	22/02/2023 16:05			In progress	2 / 3
Offboarding [3]	EMPLOYEE 22	21/02/2023 11:16	20/02/2023 11:16	21/02/2023 11:16			In progress	0 / 3
	EMPLOYEE 67	22/09/2024 13:48	20/09/2024 07:30	20/09/2024 17:00			Cancelled	0 / 0
	EMPLOYEE 12	27/02/2023 00:00	24/02/2023 09:00	24/02/2023 17:00			In progress	0 / 3
Onboarding [1]	EMPLOYEE 15	28/02/2023 16:30	21/02/2023 16:30	03/03/2023 16:30			In progress	1 / 6

As soon as the first task is **To be processed**, the process will change to **In progress** status.

I can cancel a process.

Display: To filter my search dates and process statuses, I use the filter ⑤. I switch to detail view to act on the processes ⑥ (see below).

To display the processes of several people, I check them in the list at the bottom of the screen ⑦ and I validate my choice by clicking +. If I check **Grouped mode by default**, the monitoring is automatically displayed for the entire selected population.

* Option

I want to track the progress of different tasks in real time and assign them to the right people.

4 I open the task monitoring by going to **Attributed tasks** ¹. I can see the status ², the recipient ³ and the employee concerned ⁴ for each task.

5 I select the task to take action on it:
Skip to process, Reassign, Being dealt with, Finish, Cancel.

Each recipient is **alerted** by email of tasks assigned to them and validates them via their **HR portal** once they have been completed.

I can group the items in the table.

I can export the list.

Recipient(s)	Task	HR process	Employee concerned	Effective date	Previewed start date	Previewed end date	Status
ADMINISTRATOR Kato [8]	Fill in paperwork	Crossboarding	EMPLOYEE 3	17/02/2023 16:21	16/02/2023 16:21	17/02/2023 16:21	Finished
	Fill in paperwork	Offboarding	EMPLOYEE 22	21/02/2023 11:16	20/02/2023 11:16	21/02/2023 11:16	Being dealt with
	Move offices	Crossboarding	EMPLOYEE 9	22/02/2023 16:05	21/02/2023 16:05	22/02/2023 16:05	Finished
	Fill in paperwork	Crossboarding	EMPLOYEE 9	22/02/2023 16:05	21/02/2023 16:05	22/02/2023 16:05	Finished
	Prepare desk space	Onboarding	EMPLOYEE 15	28/02/2023 16:30	23/02/2023 16:30	28/02/2023 16:30	Finished
	Book restaurant reservation	Onboarding	EMPLOYEE 15	28/02/2023 16:30	01/03/2023 16:30	02/03/2023 16:30	Planned
	Renew try-out period	Onboarding	EMPLOYEE 15	28/02/2023 16:30	02/03/2023 16:30	03/03/2023 16:30	Planned
	Welcome into new team	Crossboarding	EMPLOYEE 67	22/12/2024 13:48	20/12/2024 07:30	20/12/2024 17:00	Planned
EMPLOYEE 11 [2]	Move offices	Crossboarding	EMPLOYEE 11	13/04/2023 16:06	12/04/2023 16:06	13/04/2023 16:06	To be processed
	Fill in paperwork	Crossboarding	EMPLOYEE 11	13/04/2023 16:06	12/04/2023 16:06	13/04/2023 16:06	To be processed
EMPLOYEE 12 [2]	Fill in paperwork	Offboarding	EMPLOYEE 12	27/02/2023 00:00	24/02/2023 09:00	24/02/2023 17:00	To be processed
	Return tools	Offboarding	EMPLOYEE 12	27/02/2023 00:00	24/02/2023 09:00	24/02/2023 17:00	To be processed
EMPLOYEE 22 [1]	Return tools	Offboarding	EMPLOYEE 22	21/02/2023 11:16	20/02/2023 11:16	21/02/2023 11:16	To be processed
EMPLOYEE 3 [1]	Move offices	Crossboarding	EMPLOYEE 3	17/02/2023 16:21	16/02/2023 16:21	17/02/2023 16:21	To be processed
EMPLOYEE 5, EMPLOYEE 6, EMPLOYEE 1, EMPLOYEE 12 [2]	Move offices	Crossboarding	EMPLOYEE 67	22/12/2024 13:48	20/12/2024 07:30	20/12/2024 17:00	Planned
EMPLOYEE 67 [2]	Fill in paperwork	Crossboarding	EMPLOYEE 67	22/12/2024 13:48	20/12/2024 07:30	20/12/2024 17:00	Planned
MANAGER 3 [2]	Meeting with manager	Offboarding	EMPLOYEE 22	21/02/2023 11:16	20/02/2023 11:16	21/02/2023 11:16	To be processed
	Create IT account	Onboarding	EMPLOYEE 15	28/02/2023 16:30	21/02/2023 16:30	28/02/2023 16:30	To be processed
MANAGER 4 [1]	Meeting with manager	Offboarding	EMPLOYEE 12	27/02/2023 00:00	24/02/2023 09:00	24/02/2023 17:00	Being dealt with

Search on all the columns

Finish Skip to process Cancel the task Being dealt with Reassign

Surname [38/39] First name Section(s)

EMPLOYEE 66 Administration
EMPLOYEE 67 Administration
EMPLOYEE 68 Servicing
EMPLOYEE 69 Manufacturing

Display: To filter my search dates and task statuses, I use the filter ⁵. I switch to detail view to consult the details of the task ⁶.

To display the tasks of several recipients, I check them in the list at the bottom of the screen ⁷ and I validate my choice by clicking

8 CERTIFICATIONS* (MANAGE)

I want to manage certifications and their validity periods, renew them and follow up each employee.

- 1 I open the monitoring in **Simplified view** to focus on the essentials or in **Complete view** with details per employee and certification 1 I can see the status 2 of each certification.
- 2 I chose one or several people and click on + to add a new certification 3 . I select the certification and fill in the necessary dates. If a medical check-up is required 4 , I can link the certification directly to the check-up concerned for better follow-up.

Certifications can also be viewed from the employee file **Configure > Career > Certifications**.

HR process | Certifications | Medical appointments

Selection: 80 employees
Grouped mode by default

Certification display mode: Simplified view (1) Complete view (2)

Search on all the columns

Surname/First name	Certification	Category	Obtained	Expiry	Renewal limit	Status	Medical check-up carried out	Training carried out	Detail
PINAULT Laurence [10]	Driving licence for forklift truck [1]	Driving licence	07/12/2017	06/12/2022	06/10/2022	Expired			
	Response Manager [9]								
	Electricity	Electricity	01/04/2023	28/03/2026	28/12/2025	To come	Not required	Not required	
	Electricity	Electricity	01/02/2023	01/02/2026	01/12/2025	In progress	Not required	Not required	
	Electricity	Electricity	08/07/2017	07/07/2022	07/05/2022	Expired	Not required	Not required	
	Electricity	Electricity	08/07/2019	07/07/2022	07/05/2022	Expired	Not required	Not required	
	Electricity	Electricity	08/07/2020	07/07/2022	07/05/2022	Expired	Not required	Not required	
	Electricity	Electricity	22/05/2020	21/05/2021	21/03/2021	Expired	Not required	Not required	
JACKSON Steve [1]	Construction machinery [1]								
	Driving licence	Driving licence	07/05/2013	06/05/2023	06/03/2023	In progress			
	Procedure maintenance Machine A [1]	Security	12/09/2017			In progress	Not required	Not required	
HUMETTE Hervé [1]									
FREMONT Lise [1]	First aid staff at the workplace [1]								
	Security	Security	12/09/2019	11/09/2021	11/07/2021	Expired	Not required	Not required	

7 Search on all the columns

7

I can group the items in the table.

Information about Check-up and Training

In Simplified view, I can add a certification period by clicking on +.






Display: To filter my search dates and certification statuses, I use the filter 5 . I switch to detail view to act on the certifications 6 .

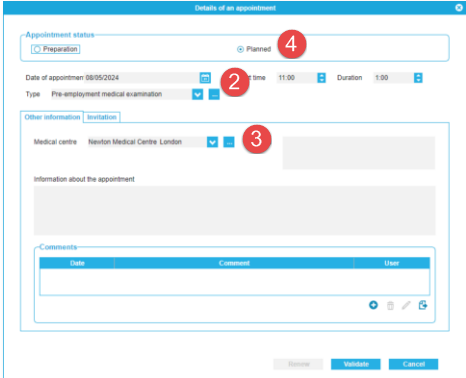
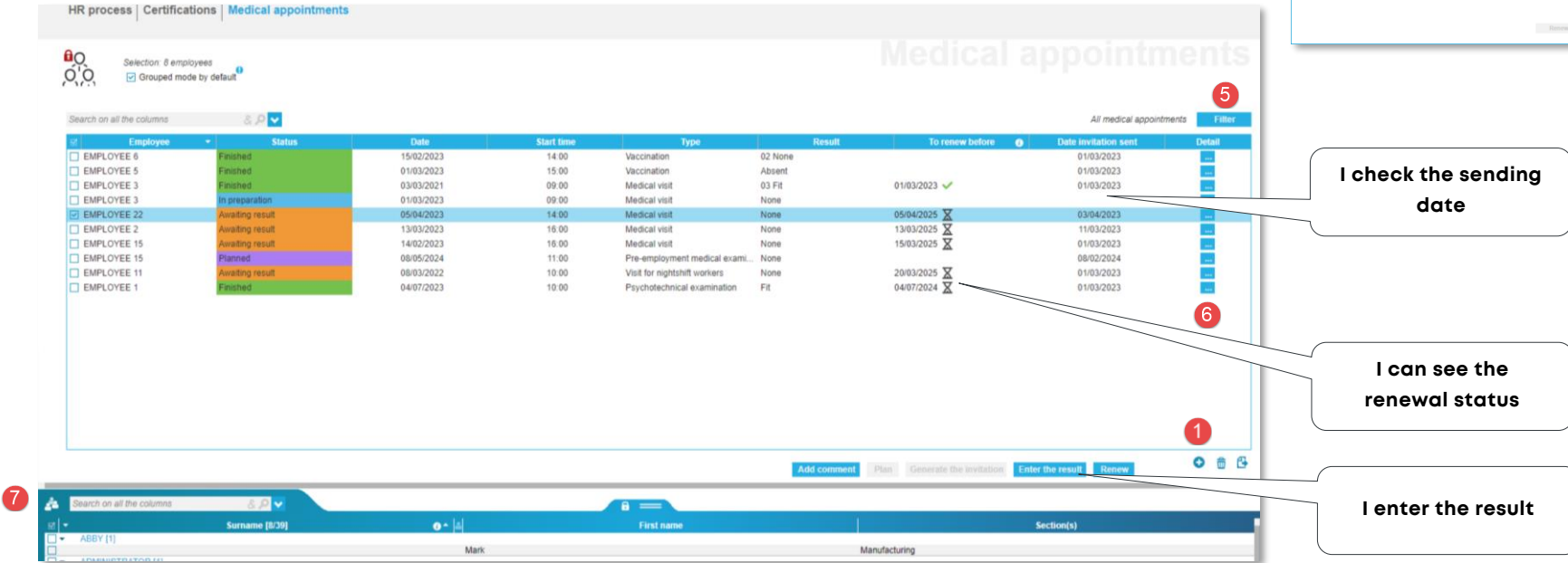
To display the certifications of several people, I check them in the list at the bottom of the screen 7 and I validate my choice by clicking +.

* Option





9 MEDICAL APPOINTMENTS* (MANAGE)

I want to manage medical appointments and vaccinations in my company to generate invitations (using the mass-mailed reports feature) and to bulk analyse the results.

- 1 I chose one or several people and click on  to add new appointment .
- 2 Once the appointment file is open, I select date, type  and medical centre . As soon as I know the time of the appointment, I tick **Planned** . I choose the invitation type (mass mailing or file).
- 3 Depending on the status of the appointment, I can take action:
Add comment, Plan, Generate the invitation, Send the invitation, Enter the result, Renew.

Employee	Status	Date	Start time	Type	Result	To renew before	Date invitation sent	Detail
EMPLOYEE 6	Finished	15/02/2023	14:00	Vaccination	02 None		01/03/2023	
EMPLOYEE 5	Finished	01/03/2023	15:00	Vaccination	Absent		01/03/2023	
EMPLOYEE 3	Finished	03/03/2021	09:00	Medical visit	03 Fit		01/03/2023	
EMPLOYEE 3	In preparation	01/03/2023	09:00	Medical visit	None	01/03/2023		
EMPLOYEE 22	Awaiting result	05/04/2023	14:00	Medical visit	None	05/04/2025	03/04/2023	
EMPLOYEE 2	Awaiting result	13/03/2023	16:00	Medical visit	None	13/03/2025	11/03/2023	
EMPLOYEE 15	Awaiting result	14/02/2023	16:00	Medical visit	None	15/03/2025	01/03/2023	
EMPLOYEE 15	Planned	08/05/2024	11:00	Pre-employment medical exam.	None		08/02/2024	
EMPLOYEE 11	Awaiting result	08/03/2022	10:00	Visit for nightshift workers	None	20/03/2025	01/03/2023	
EMPLOYEE 1	Finished	04/07/2023	10:00	Psychotechnical examination	Fit	04/07/2024	01/03/2023	

Display: To filter my search dates and medical appointment statuses, I use the filter . I switch to detail view to act on the medical appointment . To display the appointments of several people, I check them in the list at the bottom of the screen  and I validate my choice by clicking .

* Option

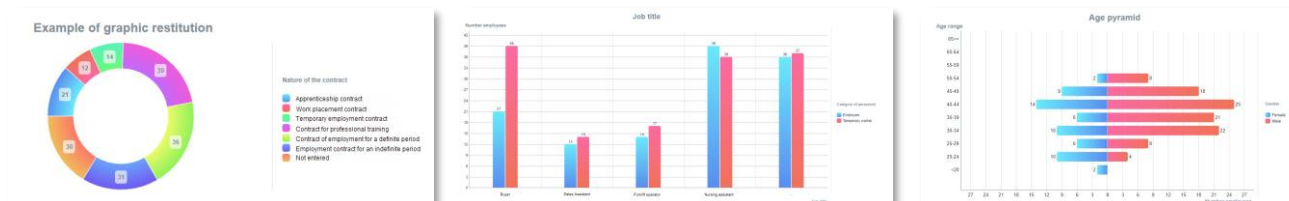
10 ANOMALIES (SUPERVISE)

HR anomaly processing is further enhanced by a wide range of features:

- anomaly detection and processing in real time
- customisable search criteria and filters
- individual or collective mode management
- multi-function correction screen adapted to the anomaly processed
- individual or grouped anomaly acknowledgement
- SMS or email alert to the employee and line manager to request information about the anomaly being processed
- logging of the anomalies processed possible
- anomaly monitoring sent by email in real time or as a daily report
- possibility to acknowledge an anomaly by running a process (with the HR process option)

11 DATA CHARTS (ANALYSE)

I want to create reports using data from the employee file such as the age pyramid, distribution by nature of Contract. I export the data in CSV format for further processing.



12 MASS-MAILED REPORTS AND EXPORTS (PRINT/EXPORT)

I want to produce employment contracts, certificates of employment, invitations or any other document quickly and in bulk. All generated mass-mailing reports can be sent to the employees by email or they can be attached to a tab in their employee file. I can even send them for electronic signature (commercial option).



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Certificate of employment

Cholet, the 5 septembre 2022

I, the undersigned, Fabrice CLENET, acting in my capacity as manager, hereby certify that **Mr ABBY Arnaud**, whose social security number is **1468096204606770**, has been employed in our company since **01/01/2008**.

Please accept the assurance of my best regards.

Fabrice CLENET
Human Resources Manager
Electronic signature
(CF next page)



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