Flexar

putting flex work to work

Administrator Options

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Rupert&COMPANY
Guides to a changing workplace

NOTE: In the following slides the notes or annotation for the slide are text boxes inserted in the slide.

This is a sample of the notes or annotations text box as they will appear in the following slides – text is red, italic, Ariel, 12 or 14 pt. The boxes have no outline and vary in transparency.

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LandingPage Options

Feature and Configuration Test Site

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Flexibility Portal

This is the LandingPage or the 'Flexar Portal' – providing access to all parts of the Flexar system and collaborative systems like the Orientation and Toolkit. It is completely customizable.

This is the official FM_Test1 of tools for Managers and Ass work arrangements to improve their work effectiveness. The Flexibility Toolkit includes self-assessments, training, best practices segments and the Flexibility Monitor.

To get the most out of this system, we strongly recommend that first time users go through the Orientation and Toolkit first. On return visits you can go directly to the most relevant material.

ORIENTATION	TOOLKIT	ASSOCIATE PROPOSAL	MANAGER PROCESS	ADMINISTRATOR ACCESS
to the groundrules and the process for proposing	provides an overview of all options, training and FAQs	connects to the on-line system to create or edit proposals	enables the manager to process associates' proposals	allows maintenance of the Flexibility Monitor system

The Administrator Menu is accessed by clicking the "Administrator Access" box.

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Administrator Options

Feature and Configuration Test Site

This banner is customized per client specifications to appear as part of their intranet (instead of a cloud-based service) and is presented at the top of every page.

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Home   **Logout**

The Flexibility Monitor - Administrator Menu

Welcome to Pipersoft's Administrator operations menu. This menu provides access to all of the operations to be performed by an administrator. For details on each operation select the help button below.

Administrator Options

- ▶ **Setup & Behavior Options**

- ▶ **Manage Templates for Proposals, Reviews, Evaluations and Surveys**

- ▶ **Manage Email Messages**

- ▶ **Manage Users**

- ▶ **Manage Arrangements**

- ▶ **Process Proposals: Approve, Decline, Request Modification**

- ▶ **Help**

Menu options can be excluded to meet your needs.

The text between the "Home" bar and the "Administrator Options" is optional and customizable.

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Configuration Options

Pipersoft support personnel typically use on behalf of the client:

➢ ***Setup & Behavior Options*** to establish the business rules and properties preferred by the customer.

➢ ***Manage Templates***… in order to suppress or activate different Document templates for different operations and change them to meet customer preferences.

➢ ***Manage Email Messages*** to achieve the email messaging and operations links preferred by the customer.

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Customer Admin Options

Customer Administration personnel typically use:

➢ ***Manage Users*** to correct or augment data in a Person entry as needed, including change managers for sake of Arrangement review.

➢ ***Manage Arrangements*** to change the Status of an Arrangement as needed – over-ride a Decline, re-set to Modify so corrections or enhancements can be made, set to Active if the manager is unavailable; change start or end dates.

➢ ***Process Proposals*** – either manager substitute or formally in the process (see Manager Options – Process Proposals).

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Manage Users – select an entry

Home   **Logout**

Persons

Last Name:	EmployeeID:	Email:

Use the Search option to quickly isolate the target entry.

First Name	Last Name	EmployeeID	Email
Bill	Valentino	A00201	richard.latty@soleng.com
Richard	Davis	A00103	richard.latty@soleng.com
Bond	James	A00104	bond@soleng.com
Paul	Rasmis	A00101	admin@flexwa.com
John	Silver	A00105	johm@yahoo.com
Keith	Jones	A00130	admin@flexwa.com
Fred	Cormon	A00131	admin@pipersoft.net
Thomas	Anderson	A00106	richard.latty@caswellfp.com
James	Jacob	A00107	lattyrichard@hotmail.com
Louis	Mark	A00108	louis.mark@mail.ro
Jane	Mathias	A00109	jane.mathias@mail.ro
Marry	Popkins	A00110	marry.popkins@yahoo.com
Harry	Atkinson	A00111	
Isaac	Thomas	A00112	
Ford	Newton	A00113	admin@flexwa.com
Lois	Lane	A00114	lattyrichard@hotmail.com
Dan	Mitchel	A00115	richard.latty@gmail.com
John	Mill	A00116	richard.latty@soleng.com
Albert	Camus	A00117	richard.latty@soleng.com
Ben	Franklin	A00119	richard.latty@caswellfp.com
Thomas	Jefferson	A00120	richard.latty@caswellfp.com

Click the header text in any column to sort the entries on that column, Click the column twice to reverse the order.

Highlight the target person and then select the operation from the bottom bar.

Total number of entries.

Page [1] of 60 ▶ ▶| ⟳ Displaying 1 - 200 of 11904   ✎ Edit 📄 Add

Manage Users – edit data

Edit Person

Person Details | Person Account

First Name:	Thomas	Personnel Area:	Writers
Last Name:	Jefferson	Public Sub Area:	Library2
EmployeeID:	A00120	Cost Center:	Writers
Email:	richard.latty@caswellfp.com	Group:	
Manager Name:	John Mill	Sub Group:	Grand Writers
2nd Level Manager Name:	Albert Camus	Hire Date:	3/13/2010
HRBP:	Albert Camus	Level:	Admin
Job Title:	Writer	Exempt Status:	E
Function:		Company Name:	Amgen
Org Unit:	Writers	Vice President:	John Adams
Org Unit Number:	5	Country Code:	US

All properties of any person in Flexar can be managed in "Manage Users". The caption text can be customized to meet the needs of the customer and fields can be ignored.

Save   Close

Manage Arrangements – select an entry

Home   Logout

Admin Arrangement List

Person Last Name:	Status:	Created From:	Created To:	
	unspecified ▾			🔍 Search

Last Name	First Name	Arrangement Name	Status	Date Created	Start Date	End Date
Rogers	Roy	Rogers_Roy_20131018_189	Submitted	10/18/2013	10/18/2013	12/2/2013
Smith	Bob	Smith_Bob_20131018_190	Pending	10/18/2013		
Lane	Lois	Lane_Lois_20131018_191	Withdrawn	10/18/2013	10/18/2013	12/9/2013
Lane	Lois	Lane_Lois_20131018_192	Submitted	10/18/2013	10/18/2013	12/16/2013
Stark	Hunter	Stark_Hunter_20131018_193	Approved-1	10/18/2013	10/21/2013	1/1/2014
Jacob	James	Jacob_James_20131018_194	Pending	10/18/2013		
Cherukuri	Sreedhar	Cherukuri_Sreedhar_20131021_195	Pending	10/21/2013		

Highlight the target Arrangement and then select the operation from the bottom bar.

| ◄◄ ◄ Page 1 of 1 ► ►► ↻ | Displaying 1 - 7 of 7 | 📝 Edit 🗑 Delete 🖨 Print |

Manage Arrangements – edit details

Edit Arrangement

Details

Arrangement Name:	**Rogers_Roy_20131018_189**
Current Status:	**Submitted**
Staff Member:	**Roy, Rogers, richard.latty@soleng.com**
Arrangement Status:	Submitted
Levels Approved:	0
Proposed Start Date:	10/18/2013
Expected End Date:	12/2/2013

The Administrator may change the Status, Levels Approved (stage of processing), Start Date and End Date. This is normally used to correct a processing decision, but may also be used to accelerate Approval on behalf of the managers.

Save   Close

Manage Arrangements – select status

Home   **Logout**

Edit Arrangement

Details

Arrangement Name:	**Rogers_Roy_20131018_189**
Current Status:	**Submitted**
Staff Member:	**Roy, Rogers, richard.latty@soleng.com**
Arrangement Status:	Submitted ✕ ⌄

- unspecified
- New
- Pending
- Submitted
- Approved
- Modify
- Declined
- Withdrawn
- Re-submitted
- Active
- Ended
- Terminated
- Completed
- Left (employment)

Levels Approved:

Proposed Start Date:

Expected End Date:

If a Status change is required, then select the appropriate Status from the list displayed.

💾 Save   Close

Manage Arrangements – change date

If a date change is required, then select the appropriate date from the calendar.

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Summary

Administrator Options Menu has 2 groups of methods:
1) used by Pipersoft Flexar specialists on behalf of the client for:
    a) managing all configuration and behavior options data,
    b) flex work types, default schedules and agreement documents,
    c) email messaging (text, recipients, attachments, conditions),
    d) proposal questions, their response properties and support text,
    e) evaluations, reviews and surveys,
2) used by the client Administrator for:
    a) on-going support of use,
    b) correcting Arrangements and User Data,
    c) processing proposals as substitute for any manager.

Other Components

Pipersoft support personnel create, configure and manage unique instances for each customer:

➢ Flexar Website (graphics, style sheets, access control, agreement documents, menu and panel text)

➢ Database & Report Server instance (scheduled backups).

➢ Email Account/Service – provides scheduled email alerts, outgoing only.

➢ FTPS Account and Folder – a unique folder, account and password on our certificated, SSL encrypted FTPS server for the transfer of sensitive files.

➢ DataImport – service to retrieve, decrypt and import Person data from the client HR database (PGP file encryption).

➢ SAP/Crystal Report suite and database connection.

➢ SSO optional, Event Scheduler entries for each client.

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NEXT STEPS

Your company could be enjoying the benefits of **Flexar** within 3 weeks for less than you expect.

There is nothing to buy, no hardware or specialized software to acquire. Users need only a browser (on their computer, notepad or phone).

You can view the Flexar Reports and Emails presented in the Walkthrough section.

If you have any questions or would like to schedule a Flexar demonstration, please call 240-602-1127 and ask for a Flexar specialist or email support@pipersoft.net with your request.

If you would like a cost quote and proposal, please call the above number and ask for a Flexar Sales specialist or email your request.

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