

Comaea Administration Guidance

Contents

- Reporting Tips 2
 - Simple Search..... 2
 - Advanced Search..... 3
- Administration - Need to Know Topics 4
 - How to Move an Org Unit from one part of your organisation to another:..... 4
 - How to Move an Employee from one part of your organisation to another: 4
 - How to Amend an Employee’s Line Manager:..... 4
 - How to Give a Person Approval Rights Over Another Person (e.g. Functional Manager)..... 5
 - How to give Someone Manager Rights:..... 5
 - How to Give Someone Admin Rights: 5
 - How to find out who manages who..... 6
 - How to add a Job Role to a person’s profile 6
 - How to reset a password 7
 - How to delete a leaver..... 7
 - How to add a new employee 8
 - How to create an Org Unit 8
 - How to escalate a problem 9

Reporting Tips

There are two types of searching:

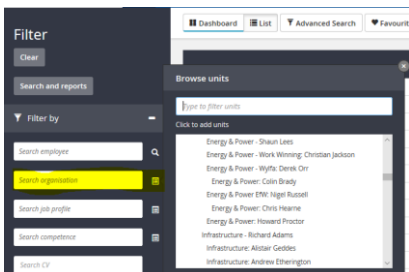
1. Simple Search
2. Advanced Search

Simple Search

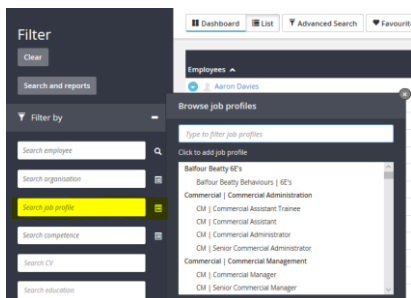
Use the filters on the left hand side of the **HOME** page to search for:

TIP: When you start typing the Database Lookup starts when you have entered three or more characters. Don't press Return, just wait for the results to appear and you can select the one you need.

- **Employees** – you will only be able to see employees that you have rights to see. View the employees in the LIST VIEW and click their name to view their profile. Note – you can click the Blue Arrow next to their name for more shortcut options
- **Organisation Units** – you will only be able to see org units that you have rights to see. All employees in the selected Org Unit and below will be returned in the search and the DASHBOARD VIEW and LIST VIEWS will be updated. Note – click on the icon next to the search field for a list of all Org units to select from. You can select multiple Org Units.



- **Job Profiles** – You can select multiple job roles and/or career paths. The search results will only show people in the org units you have rights to see.

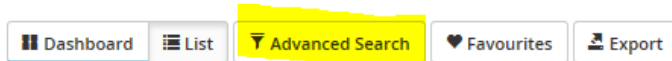


- **Competence** – you can select multiple specific competencies to search for. The results will only show employees in the org units you have rights to see.

TIP: The dashboard widgets will update with the search results – they may take a few seconds to load. You can save your searches by clicking the FAVOURITES button. You can export your results in the LIST VIEW by clicking the EXPORT button.

Advanced Search

Click on the Advanced Search button at the top of the HOME page.



Add the filters you want to the search window and chose to view the results in the Dashboard or List view. You can save Advanced filters by clicking the Favourites button.

Advanced search
✕

AND OR

+ Employee

OR

0 Results Found + Organisation

OR

+ ✕

Gas & Water

✕

 Include sub-organisations
 Exclude users for this unit

AND OR

0 Results Found + Job Profile

AND OR

+ ✕

AND OR

+ ✕

P3M | Project Manager

✕

Job profile compliance to

Job Progression Current

APM Overall Grade < D C B A

 Employees not assigned to job profile

P3M | Senior Project Manager

✕

Job profile compliance to

Job Progression Current

APM Overall Grade < D C B A

 Employees not assigned to job profile

AND OR

+ Competency

AND OR

+ Assignment

AND OR

+ Education

AND OR

+ Course

AND OR

+ Work history

Cancel Clear Favourites Dashboard List

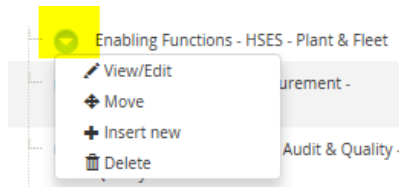
TIP: Take careful note of the AND/OR options and set them accordingly.

Administration - Need to Know Topics

How to Move an Org Unit from one part of your organisation to another:
In **Admin View > Organisation Structure**.

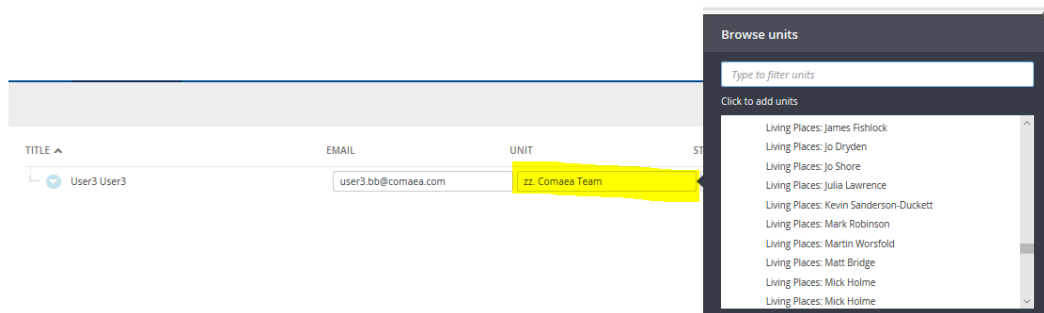
Navigate using the tree structure to find the org unit you want to move or use the Search Organisation filter on the left hand side.

Click on the Blue Arrow and select “move” option. Find the unit you want to move it to.



How to Move an Employee from one part of your organisation to another:
In **Admin View > User Management** use the Search Employee filter to find the employee.

Click on the UNIT field and this will bring up the Browse Units window. Select the unit you wish to move them to. Don’t forget to click SAVE when you are done.



How to Amend an Employee’s Line Manager:

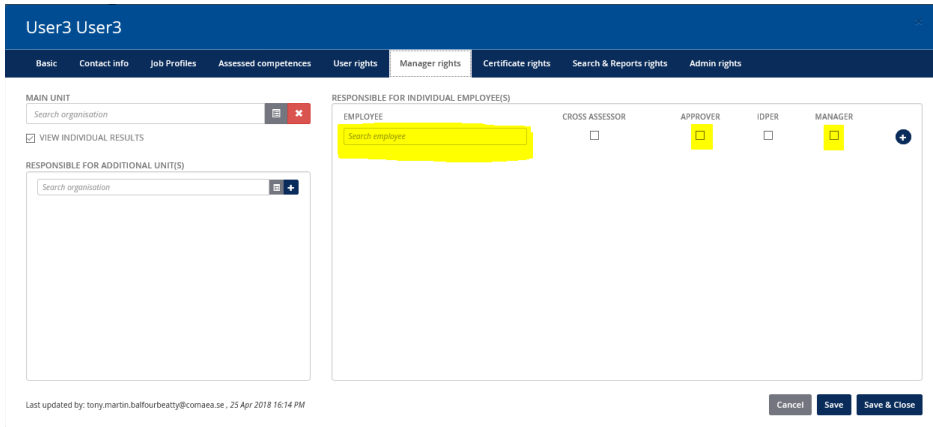
In **Admin View > User Management** use the Search Employee filter to find the employee. (as “How to Move An Employee from one part of your organisation to another”)

Click on the UNIT field and this will bring up the Browse Units window. Select the unit you wish to move them to. Don’t forget to click SAVE when you are done.

TIP: You will need to ensure the line manager is set up as an Org Unit within the relevant tree structure first. If you are unsure if already exists or not, then go to ADMIN VIEW > ORGANISATION STRUCTURE and Search Organisation.

How to Give a Person Approval Rights Over Another Person (e.g. Functional Manager)

In **Admin View > User Management** find the new manager. Click on their name (opens new box). Click on **Manager Rights** and update the **Responsible for Individual Employee(s)** section. Do the same for current manager but remove the 'Responsible For' rights for the person in question.



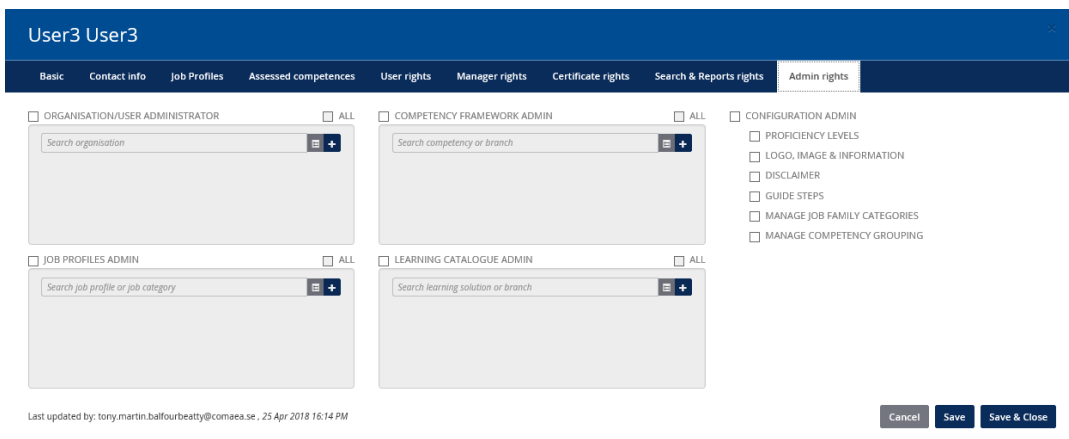
How to give Someone Manager Rights:

In **Admin View** go to **User Management** find the person. Click on their name (opens new box). Click on **Manager Rights** and update the **Responsible for Individual Employee(s)** section.

(as "How to Give a Person Approval Rights Over Another Person (e.g. Functional Manager)")

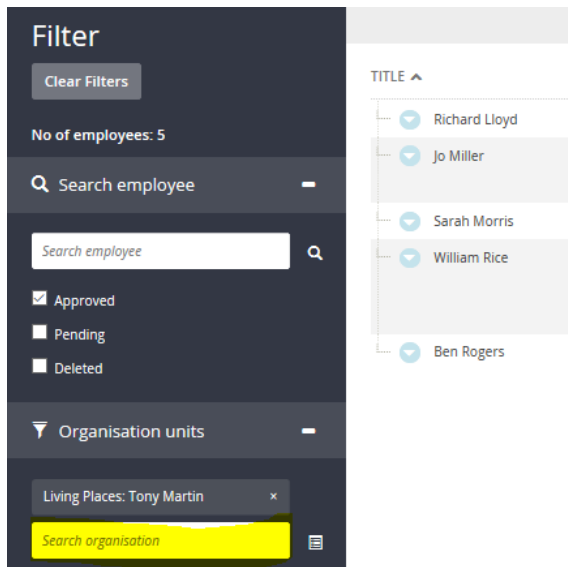
How to Give Someone Admin Rights:

In **Admin View > User Management** find the person. Click on their name (opens new box). Click on **Admin Rights** and update the relevant sections.



How to find out who manages who

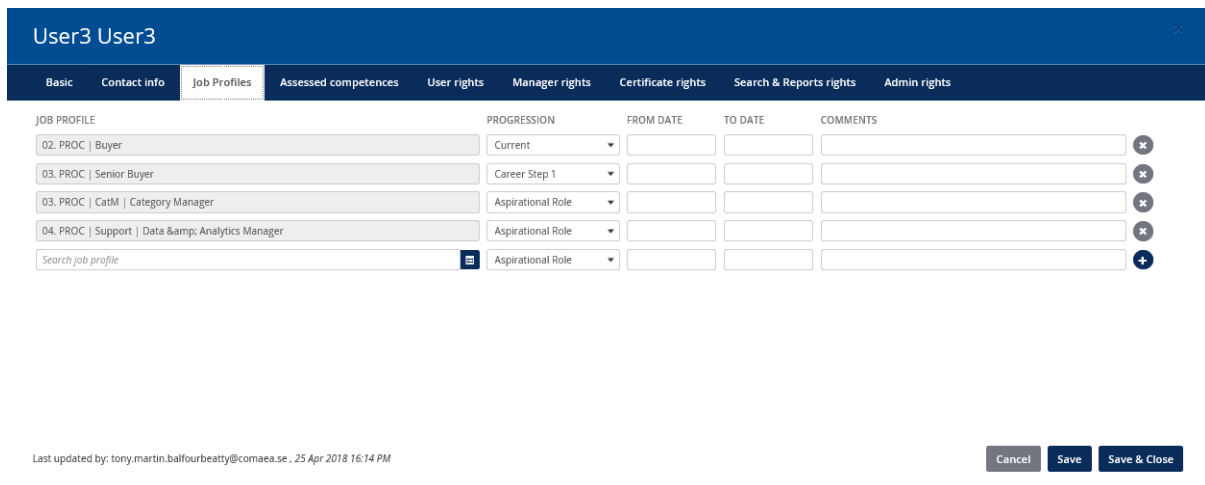
In **Admin View > User Management** use the Search Organisation filter to search for the Manager. All their direct reports will be shown.



How to add a Job Role to a person's profile

In **Admin View > User Management** use the Search Employee filter to find the employee.

Click their name and go to the Job Profiles tab. You can add, edit and delete job roles from here.



TIP: Ensure that people only have one CURRENT role. Only CURRENT job Roles are used in the default reports and dashboards (unless otherwise selected)

How to reset a password

In **Admin View > User Management** use the Search Employee filter to find the employee.

Click their name and on the BASIC Tab you can enter a new password here.

TIP: Choose something simple and then click the “Prompt User to Change Password” checkbox so they have to enter their own password when they first log in.

The screenshot shows the 'User3 User3' profile page. The 'Basic' tab is active. The form contains the following fields: PHOTO (with an 'Upload photo' button), FIRST NAME * (User3), LAST NAME * (User3), EMAIL * (user3.bb@comaea.com), UNIT * (zz. Comaea Team), GENDER (dropdown), BIRTH DATE (0000-00-00), NEW PASSWORD * (highlighted in yellow), and a checkbox for 'PROMPT USER TO CHANGE PASSWORD' which is checked. At the bottom right, there are 'Cancel', 'Save', and 'Save & Close' buttons. A timestamp at the bottom left reads 'Last updated by: tony.martin.balfourbeatty@comaea.se, 25 Apr 2018 16:14 PM'.

How to delete a leaver

In **Admin View > User Management** use the Search Employee filter to find the employee.

Set the STATUS to Deleted. Information will be kept for a period (1 month) before being permanently deleted.

| TITLE | EMAIL | UNIT | STATUS | JOB POSITION | MANAGER OVER UNIT | JOB PROFILES |
|-------------|---------------------|-----------------|--------------------------------|--------------|-------------------|---|
| User3 User3 | user3.bb@comaea.com | zz. Comaea Team | Approved Pending Deleted | | | 03. PROC CatM Category Manager, 02. PROC Buyer, 03. PROC Senior Buyer, 04. PROC Support Data & Analytics Manager |

IMPORTANT NOTE: If you click the Blue Arrow next to the name you have the option to delete.



*If you select **Delete** from here, the record will be **permanently and immediately** deleted and **cannot be reinstated**. Please use this cautiously and the preference is to set the **STATUS** to Deleted.*

How to add a new employee

In **Admin View > User Management** click on the **+ Insert new employee** button on the top right.

In the Insert New Employee window you can enter the details – First Name, Last Name, Email.

Also add the Employee ID number in the ID Field.

You will need to select a UNIT – this will be their Line Manager’s unit.

TIP: If the Unit does not exist then you may want to add them to a unit that does exist temporarily and then Move them (see: “How to Move An Employee from one part of your organisation to another”) once you have created the Org Unit (see: “How to create an Org Unit”)

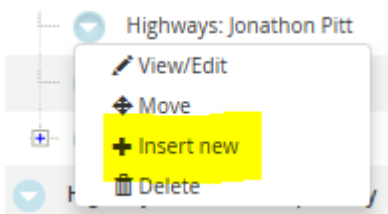
Set a temporary Password and click the “Prompt user to Change Password” checkbox.

Click on the Job Profiles Tab and select an appropriate Job Profile.

How to create an Org Unit

In **Admin View > Organisation Structure**.

Navigate using the tree structure to find the parent org unit you want to put the new org unit under or use the Search Organisation filter on the left hand side to find the parent org unit. Click on the Blue Arrow and then click on **Insert New**



This will open up the Insert New Unit window where you can enter the Unit name.

Insert new unit

Basic Coordinates Advanced

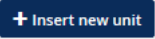
SORT UNIT STATUS

Approved

DESCRIPTION

UNIT SELECTABLE BY USERS
 DO NOT UPDATE THIS UNIT WITH IMPORTS

Cancel Save Save & Close Save & Add new

TIP: Avoid clicking the  button on the top right as this puts the unit at the top level in the tree structure and not in the right place. If you do this then see “How to Move an Org Unit from one part of BBUK to another”

How to escalate a problem

If you have an issue that you cannot resolve, you can contact the Comaea Helpdesk by emailing: support@comaea.com

The response time is normally within 2 hours.