

Exectras Premium: HR

HR is important. Because you're an Exectras member, you get access to Exectras Premium - simplified HR tools designed to make your life easier!

Use the following as a checklist to help you get started and get the most out of the portal and your Exectras Premium 60-day trial access to all the features!

Track Time Off: Vacation, PTO, Sick Days, and more

FAQ

Did you know an average employee takes up to three days of unreported PTO per year when organizations have poor tracking capabilities? Ouch.

Stop using spreadsheets! You can easily and accurately track time-off requests, approvals, and time taken. Employees have the self-service option of checking their time off balances themselves instead of contacting you.

- 🔗 The default to choose from while selecting which type of time off to request is Vacation, PTO, & Sick Days. If you want to change or add new options, your "Time Off Day Labels" can be updated in your Settings.
 - Do you want to enable any other time off types?
 - Do any time off types carry over to the next year (ie Vacation days?)
- 🔗 Set up Time Off Allowances for each employee using the "Time Off Setup" Batch Tool in Settings.
 - Starting Values: Enter the number of days that the employee has remaining for the rest of the year for each type of time off.
 - Accrual Rates: Set the "As Of" date to the current date corresponding to your starting values (ie today's date). Then enter the number of days off the employee earns in a year.
 - If there isn't a maximum # of days allotted, this can remain blank.
- 🔗 Employees will then be able to see how many days they have left for vacation, etc for the year and be able to request days off from their Dashboard or Vacation tab in their profile.
- 🔗 You will be notified via email when an employee requests time off and be able to approve it individually or any pending requests can be found in Settings > Batch Tools > Vacation Approvals.

People

FAQ

- 🔗 We encourage you to fill in as much employee profile information as you have.
 - Add/edit employees individually in this section or using the batch tool.
 - Employees will be asked to complete their General information when they first log in.
- 🔗 Add/edit Employee Employment information individually within their profile (from the People section) or within Settings > Batch Tools > Employment
- 🔗 To send an email message, select all or certain groups/individuals, then Notify > System Notification
- 🔗 To send a text message, select all or certain groups/individuals, then Notify > Text Message
- 🔗 To send account access, select all or certain groups/individuals, then Notify > Account Access

Assets & Allowances

FAQ

- 🔗 Add assets and allowances under People > Assets & Allowances (left menu)
- 🔗 Once you have created the Asset or Allowance, you can provision it to individual employees
- 🔗 View your Org Chart
 - This will build out automatically as you fill in whom every employee reports to (Settings > Batch Tools > Employment)
- 🔗 Add Job Profiles under People > Job Profiles (left menu)

Documents

FAQ

- 🔗 Do you have any documents to add?
- 🔗 Do any of your documents require a signature?
- 🔗 Which documents do you want to be featured for employees as they log in / new employees?
- 🔗 Add Searchable tags to any documents
- 🔗 Assign documents to specific employees
- 🔗 Check-in to see who has signed each document

Events

FAQ

- 🔗 Add an event
- 🔗 Subscribe to Events calendar
- 🔗 Subscribe to Time-off calendar

Performance

FAQ

- 🔗 Build a performance review, check-in, or goal-setting template
- 🔗 Clone a performance review, check-in, or goal-setting template
- 🔗 Assign/Schedule performance reviews for employees

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Settings

FAQ

- 🔗 Customize your Date & Time / Pay Period settings
- 🔗 Double-check Day Labels for Time Off
- 🔗 Add Employment Benefits
 - These would be default/minimum amounts for individuals, couples, or families, and/or you can add these individually in [Settings > Batch Tools > Benefits](#)
- 🔗 Do you have any Employment Perks?
 - These would be default amounts that apply company-wide

System Tags

FAQ

- 🔗 Add any Divisions, Departments, Event Types (ie Meeting, Social, etc)
- 🔗 Do you want to share employee birthdays? Anniversaries?
- 🔗 You can edit the welcome message employees receive when they first log in
- 🔗 You can edit the Onboarding list to remember what needs to happen when new employees start

Batch Tools (These will help you build out your employee profiles)

FAQ

- 🔗 Employee Quick Add/Archive
 - Best for adding multiple employees quickly.
- 🔗 Employment
 - Position, Reports to, Employee #, Employee Start/End Date, Division, Department, Location, Employment Type, Hours/Day
- 🔗 Salary
- 🔗 Bonus
- 🔗 Benefits
 - These packages pull from Settings
- 🔗 Time-off Setup
 - This is most helpful when you start using the software or annually if there is a change to multiple employees' allowed time off/accrual rates.
- 🔗 Vacation Approvals
 - Any outstanding time off requests will be visible here so you can approve them all at once.