

HRA Cloud e-learning Checklist FAQs

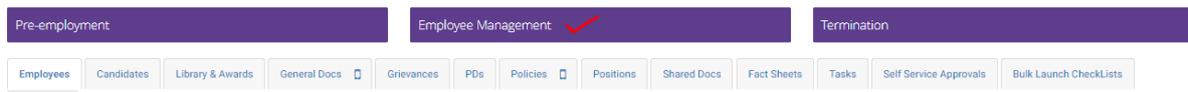
Introduction and Overview

e-learning checklist was developed to deliver training on how employees can build and maintain a respectful workplace that is free of harassment and discrimination.

The checklist is available to HR Assured account holders and uses the functionality of our Self Service (eSS) portal. Any Employee, Contractor or Volunteer record may access Self Service.

How can I access the e-learning checklist in my HRA Cloud account?

Click Employee Management



Then the checklist menu items will appear and the **e-learning: Introduction to Appropriate Behaviour Checklist (eSS)** is last on the list.

Click to commence and then select the Employee, Contractor or Volunteer you wish to complete the e-learning via Self Service.

Employee Management (OPR) ×

Which employee management process do you wish to perform?

- Create an Employment Agreement Checklist (eSS)
Create an Employment Agreement Checklist (eSS)
- Employee Induction (eSS)
Employee Induction Processes and tools to create an employee and induct them within the organisation.
- Casual Conversion
Process and tool to create a casual conversion related letters for the employee within the organisation.
- Casual Conversion Request
Process and tool to create a casual conversion request for the employee.
- WHS Induction (eSS)
Commence or Resume a WHS Induction
- Counselling for Poor Performance
Processes and tools to counsel an employee for poor performance including disciplinary process and issuing of warnings.
- Counselling for Misconduct
Processes and tools to counsel an employee for misconduct including disciplinary process and issuing of warnings.
- Scheduled Performance Review (eSS) (Flexible)
Updated general performance review functionality which provides Assessors with the ability to review the Assessee's self-assessment and accordingly amend their own assessment of the assessee (if needed). Assessors can also control when the OPR summary report is released.
- Scheduled Performance Review (eSS) (Standard)
Process and tools to conduct periodic reviews of the general performance of employees. The Assessors and Assesseees both conduct their assessments independently.
- Grievance or Complaint Investigation
Complete the steps to investigate a general complaint or grievance, including a bullying or harassment complaint
- Flexible Working Request Checklist
Create a Flexible Working Request Checklist
- e-learning: Introduction to Appropriate Behaviour Checklist (eSS)
Launch the e-learning: Introduction to Appropriate Behaviour Checklist

pro

How do I provide my workers with access to HRA Cloud Self Service?

There are two options to provide self-service:

Option 1 - Standard Registration Process

Businesses can send an email to their workforce announcing eSS and requiring everyone to register via the URL link available via **[Account Setting >> Commercial Tab>> Add-ons Tab](#)**

This option works best when your HRA Cloud account is first established with your worker records uploaded and you are ready to launch your HRA Cloud. This way you can send the one email introducing Self Service with the link for them to register.

For further details on the steps to follow, please access the knowledgebase articles below:

- For HRA Clients [click here](#)

Option 2 - eSS Registration via e-learning: Introduction to Appropriate Behaviour Checklist (eSS)

When you initiate this checklist, you will notice that it has (eSS) in the title. This shows that the checklist has a built-in eSS registration notification that is sent to the Employee, Contractor or Volunteer who have NOT already registered for Self Service. Once they register for eSS via the email notification sent by the checklist and they are provided with a secure password to use to access HRA Cloud self-service and complete the e-learning modules.

This option work best when you want to launch this training to an individual within your organisation and for new worker records who have not yet registered for Self Service.

How do I send the training out to multiple workers at the same time?

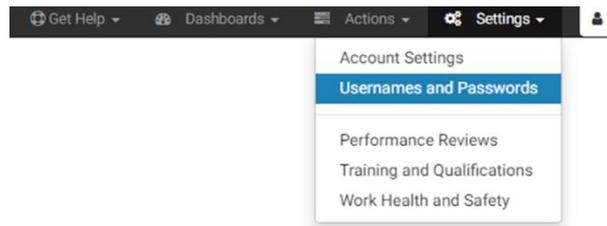
To send the e-learning checklist out, use the bulk launch function which you can then deploy the learning in batches of approximately 20 workers at a time .

To use the bulk launch functionality , ensure you have the correct user access permissions applied and the workers you select have already registered for Self Service (eSS).

Step 1. Check your user access

To check your user access:

- Navigate to the top right corner of your account home screen
- Click on Settings
- Select Usernames and Passwords from the drop-down list:



- Select your name from the Users Tab
- Select the Access Control tab over to the right next to your user Details tab.
- The User Access Role you need is labelled **“Bulk Launch Checklists”**.

Username: hra@goldfishbay2

Details **Access Control** Alert Subscriptions Login History Reports

Roles Branches Linked Record Blacklist Pairing

Edit

The roles determine the permissions granted to the user. For example, the types of records they can access, the tabs they can see and

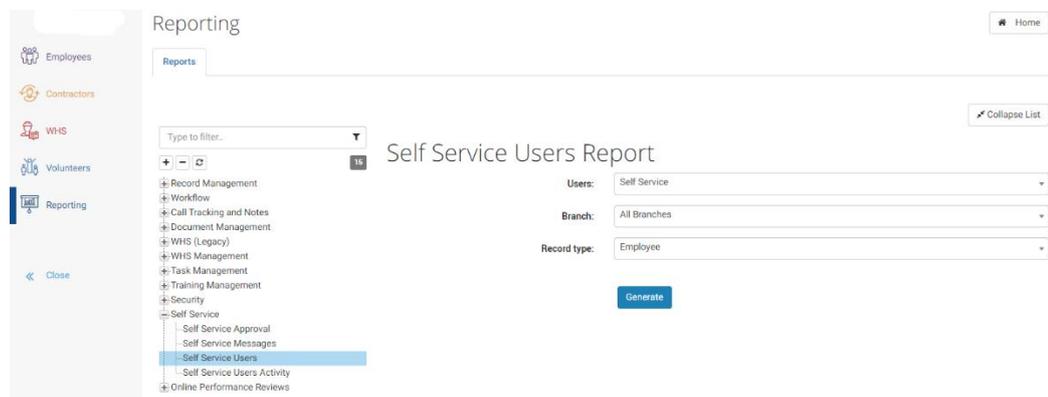
Valid role?	Role	Description
System Roles		
Yes	AllEnableHRUsers	All EnableHR Users
Yes* (eSS role)	AllSelfServiceUsers	All Self Service Users
Hub Roles		
Yes	AccountAdmin [AU]	Permission to update the settings for an account, including adding new users and branches should be limited to users that have permission to see all information in an account (inc and restricted data).
Yes	Bulk Launch Checklists [AU]	This role allows the user to bulk launch checklists and bulk launch tasks within those ch
Yes	ContractorManagement [AU]	Access to all features of the Contractor Management module within their account. Importantly, once assigned the user granted the role will have access to all information in an account (inc and restricted data). Please contact your account manager for more information.
Yes	EmployeeManagement [AU]	Access to all features of the Employee Management module within their account.
Yes* (eSS role)	eSS Employee [AU]	Standard access for Employees in their Self Service system (With Payroll Tabs)

If this access role is not assigned on your list of roles:

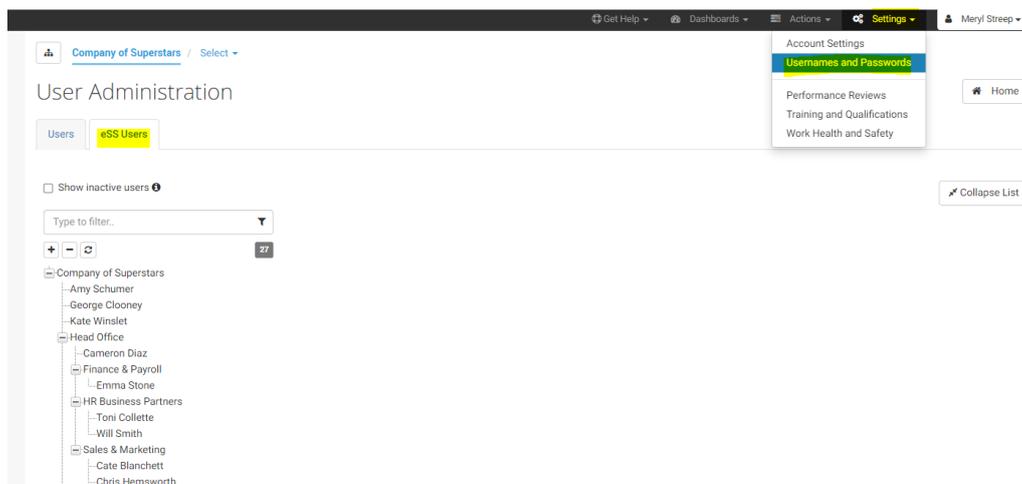
- Click the edit button
- Select the role by ticking the checkbox
- Click the blue Update button.

Step 2. Ensure all Worker Records have access to their Employee Self Service (eSS)

Option 1. You can check this by running a report in the Reporting Module selecting Self Service + symbol and clicking on Self Service Users.



Option 2. You can view your list of Self-Service Users by navigating to Settings and clicking on Usernames and Passwords. Under the eSS Users tab will a list of your current eSS users.



Note: For workers who are not registered for Self Service you will need use our two options above to initiate the registration process prior to the Bulk Launch of the Checklist or you can un-tick or un-select those workers from the Bulk Launch list.

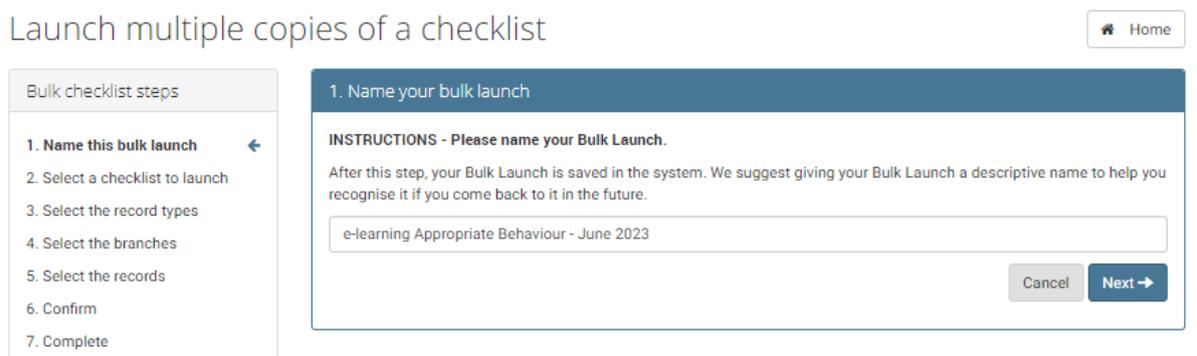
Step 3. Initiate the Bulk Launch Checklist

Navigate to the Bulk Launch Checklist Tab from Employee Management, Contractor Management or Volunteer Management Modules.

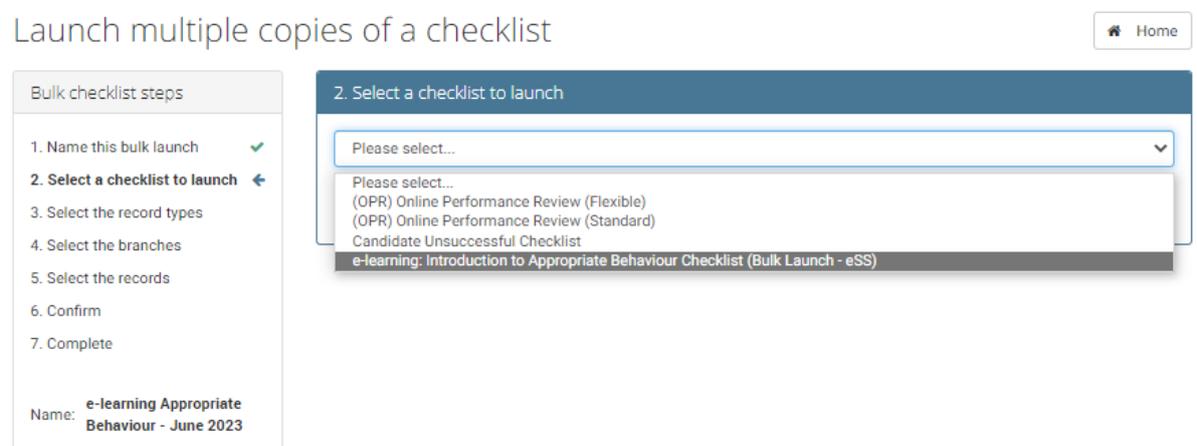
The example below is from Contractor Management:



Name your Bulk Launch and click Next.



Select the **e-learning: Introduction to Appropriate Behavior Checklist** from the drop-down option.



Select Record types by checking the boxes for Employee, Contractor or Volunteer

Launch multiple copies of a checklist

[Home](#)

Bulk checklist steps	
1. Name this bulk launch	✓
2. Select a checklist to launch	✓
3. Select the record types	←
4. Select the branches	
5. Select the records	
6. Confirm	
7. Complete	

<p>Name: e-learning Appropriate Behaviour - June 2023 e-learning: Introduction to Appropriate Behaviour Checklist (Bulk Launch - eSS)</p> <p>Checklist: Appropriate Behaviour Checklist (Bulk Launch - eSS)</p>	<h3>3. Select the record types to apply the checklist to</h3> <p><input checked="" type="checkbox"/> Contractor <input type="checkbox"/> Employee <input type="checkbox"/> Volunteer</p> <p style="text-align: right;"> ← Back Next → </p>
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Select Branch/s

Launch multiple copies of a checklist

[Home](#)

Bulk checklist steps	
1. Name this bulk launch	✓
2. Select a checklist to launch	✓
3. Select the record types	✓
4. Select the branches	←
5. Select the records	
6. Confirm	
7. Complete	

<p>Name: e-learning Appropriate Behaviour - June 2023 e-learning: Introduction to Appropriate Behaviour Checklist (Bulk Launch - eSS)</p> <p>Checklist: Appropriate Behaviour Checklist (Bulk Launch - eSS)</p> <p>Record types: Contractor</p>	<h3>4. Select the branches to apply the checklist to</h3> <p>Note: Only branches that contain records of at least one of the following record type(s) will show here:</p> <p>Contractor</p> <p><input checked="" type="checkbox"/> /Company of Superstars <input checked="" type="checkbox"/> /Company of Superstars/*Sydney</p> <p>Select all Deselect all</p> <p style="text-align: right;"> ← Back Next → </p>
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Select Record/s

At this point you will be able to tick or untick your workers records. Workers without an email ID associated with their record are highlighted with a yellow box.

Without an email against their record the notifications will not send, nor will they have registered for Self Service. Therefore, it is recommended that these workers are updated with an email address or untick records without an email address in the Bulk launch list.

Click Next once you have reviewed the workers records.

Launch multiple copies of a checklist

[Home](#)

Bulk checklist steps

1. Name this bulk launch ✓
2. Select a checklist to launch ✓
3. Select the record types ✓
4. Select the branches ✓
5. Select the records ←
6. Confirm
7. Complete

Name: e-learning Appropriate Behaviour - June 2023
e-learning: Introduction to Appropriate Behaviour Checklist (Bulk Launch - eSS)

Checklist: Appropriate Behaviour Checklist (Bulk Launch - eSS)

Record types: Contractor

Branches: *Sydney
Company of Superstars

5. Select the records to apply the checklist to

What does the warning "No email address on record" mean?

Please Note: It is recommended to bulk launch the checklist for your worker records in batches of 20. Launching in larger batches may impact the speed at which each individual checklist is launched.

	Name	ID	Position title	Branch	Type
<input checked="" type="checkbox"/>	Cleanease Pty Ltd	00002		/Company of Superstars/*Sydney	Contractor
<input checked="" type="checkbox"/>	Example Contractor	0133654		/Company of Superstars	Contractor
	No email address on record				
<input checked="" type="checkbox"/>	Outsourced IT	00001		/Company of Superstars/*Sydney	Contractor
<input checked="" type="checkbox"/>	YumYum Pty Ltd			/Company of Superstars/*Sydney	Contractor

Select all | Deselect all

← Back
Next →

Confirm Records before Launch

On this page confirm the list of records you will be launching.

You can ignore steps 1 & 2 on this page. These functions are not required for this checklist.

Once records are confirmed you can click the blue “Launch” button. If you missed someone you can click on the Back button to take you back to record selection.

6. Confirm

Instructions

Please Note: It is recommended to bulk launch the checklist for your worker records in batches of 20. Launching in larger batches may **impact the speed** at which each individual checklist is launched.

Depending on the checklist the following may apply.

Step 1: You can either bulk set values per column or set individual values per record

Bulk: You can bulk set the same values per column by selecting the button in the top row “Set Same Values For All Records”

Individual: You can set an individual value for a record by selecting the button on the record’s row. It is best to do this after any bulk values have been set for that column.

Step 2: Resolve any warning messages

Warning messages will appear on cells that require you to change or set a value. You must resolve all warning messages or the associated checklists cannot be launched

Step 3: When you have completed the applicable steps and the records have values set, select the “Launch” button

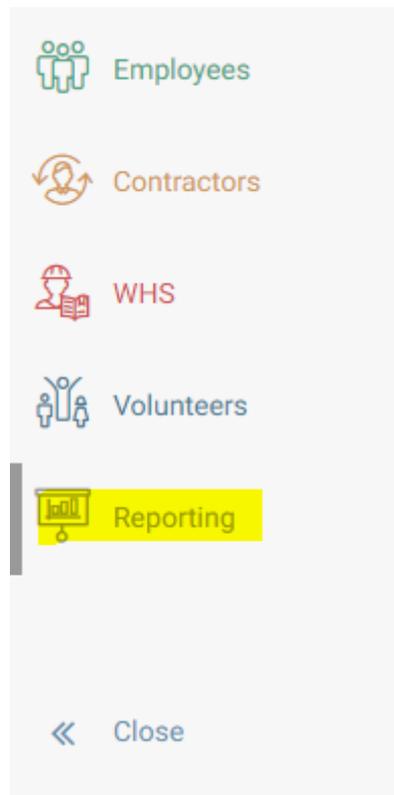
Launching will create a new checklist for all of the records listed below.

	Info Module 1 of 7: Introduction to appropriate workplace behaviour (1.01)	Info Module 2 of 7: Prohibiting sexual harassment in the workplace (2.01)	Info Module 3 of 7: Positive duty to eliminate sex discrimination (3.01)	Info Module 4 of 7: Hostile work environments (4.01)	Info Module 5 of 7: Reducing the risk of sexual harassment (5.01)	Info Module 6 of 7: Preventing workplace bullying (6.01)	Info Module 7 of 7: Understanding the impact of sexual harassment and bullying (7.01)
Set Same Values For All Records	Select...	Select...	Select...	Select...	Select...	Select...	Select...
Cleanse Pty Ltd (00002)	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override
Example Contractor (0133654)	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override
Outsourced IT (00001)	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override
YumYum Pty Ltd	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override	(Waiting for) Manual Override

How do I run a report to track what modules my workers have completed?

e-learning: Introduction to Appropriate Behavior is a checklist in HRA Cloud.

To run a report, access the Reporting module in the left-hand navigation panel in your HRA Cloud account:



- Click on Workflow in the list
- Select **Checklist Tasks Report**
- Click Generate.

Checklist Tasks Report

Report on the status of checklist tasks for records.

Sorted by:

Filter by Date:

From:

To:

Branch:

Checklist Status:

Checklist Name:

Generate

The report will appear on your Browser in a HTML format.

Checklist Tasks Report: E-learning: Introduction to Appropriate Behaviour Checklist (eSS) Total Current Steps: 8

Listing all checklists created between 01 Mar 2023 and 31 Mar 2023.

/Company of Superstars

4 results

Name	eSS Status	ID	Date Checklist Created	Date Checklist Completed	Days Checklist Open	Checklist Status	Total Tasks Remaining	Checklist % Complete	1.01 - Launch Training Modules	2.01 - Module 1 of 7: Introduction to appropriate workplace behaviour	3.01 - Module 2 of 7: Prohibiting sexual harassment in the workplace	4.01 - Module 3 of 7: Positive duty to eliminate sex discrimination	5.01 - Module 4 of 7: Hostile work environments	6.01 - Module 5 of 7: Reducing the risk of sexual harassment	7.01 - Module 6 of 7: Preventing workplace bullying	8.01 - Module 7 of 7: Understanding the impact of sexual harassment and bullying
Daniel Ricardo	✓		09 Mar 23	09 Mar 23	1	Complete	0	100%	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete
Daniel Ricardo	✓		08 Mar 23	08 Mar 23	1	Complete	0	100%	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete
Lando Noris	✓		08 Mar 23	08 Mar 23	1	Complete	0	100%	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete
Example Contractor	✗	0133654	09 Mar 23		5	Incomplete	2	75%	Complete	Complete	Complete	Complete	Complete	Complete	Incomplete	Incomplete
Total Checklists		4														
Total Complete		3	75%													
Total Incomplete		1	25%													