Ethos Group Compliance Solutions

Company Administrative Guide

Website Address: portal.ethosgroup.com

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Dashboard Tool Introduction

The Dashboard is the company administrator tool that will be used to access a store's information on the Ethos HR Online website. This information includes employees' training account details, documents available on the website, a testing schedule of when new tasks will be released, and a breakdown of employees by department and position title.

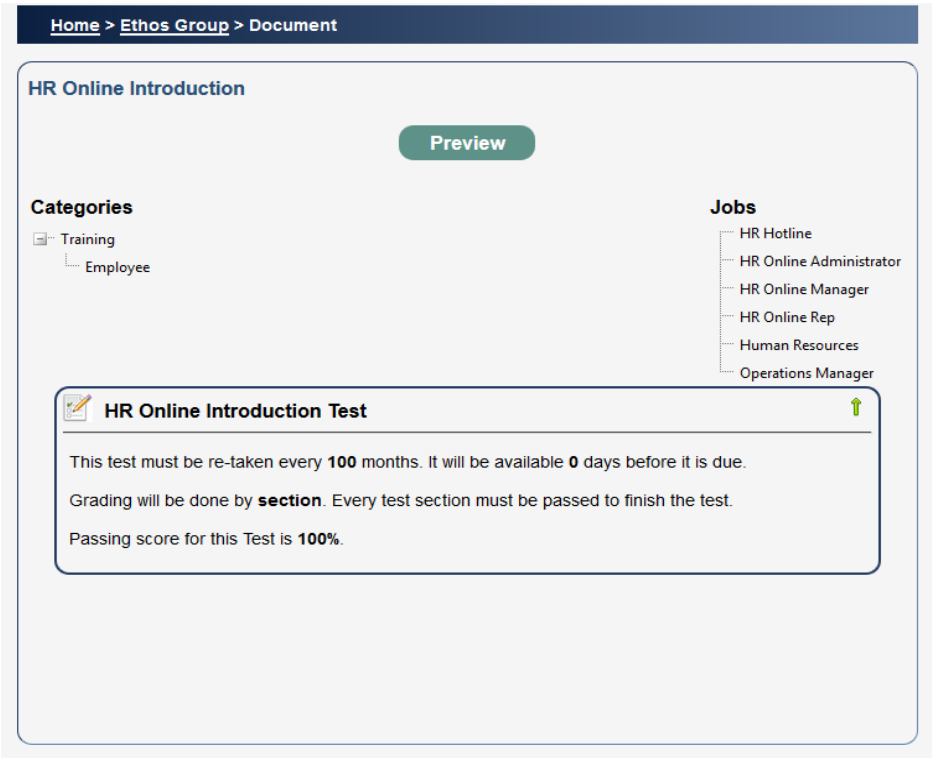
To access the Dashboard, click on the HR Online tab > Dashboard.

A blue box titled 'Dealers' will appear on the left side of the screen. This will be where you can view all stores that you have been given administrative access to. On the right side will be the average compliance percentage for all websites listed. To access a specific dealership, hover your mouse over the store's title and click the green box of arrows on the right of the name (as pictured below).

This will take you to that specific website's dashboard, which will include categories: Documents, Tests, Users, Job and Departments, and Managers. This view will also include the particular stores' compliance percentage and the store's current contact information on file with HR Online. We will explain the different categories in greater detail in the following sections.

Category:Documents

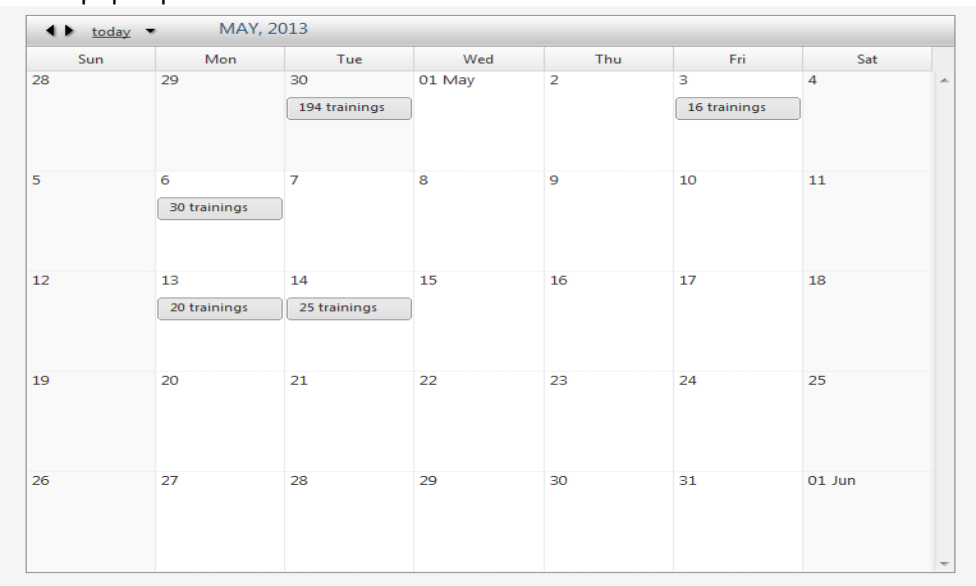
This category will allow you to view all documents and trainings currently available on the store's website. If you click on a document title, you can view what type of document it is (training versus form, manual, etc.), what position titles have access to it, and training details such as frequency and required passing score percentage if applicable. You can also click on the Preview button in the middle to view what it looks like to the typical user.



Category: Tests

This category can be used to view a monthly schedule of when all employees' training will be released. You can click on the calendar icon on the right side of the category's name to open the calendar view.

The calendar that pops up will look similar to this:

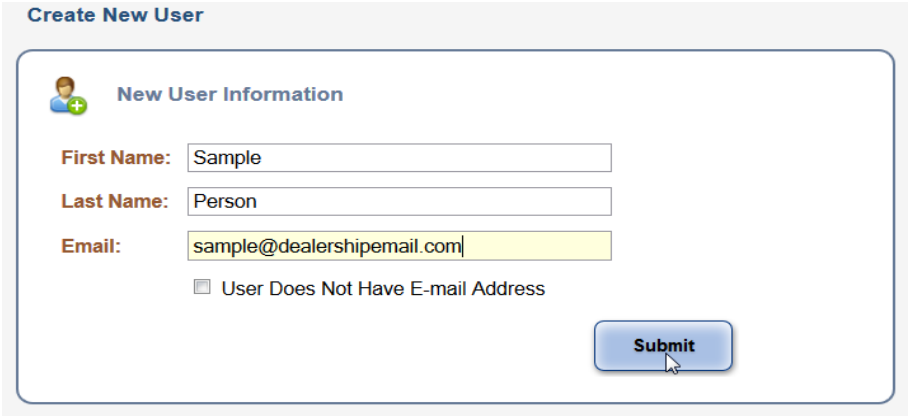


Category: Users

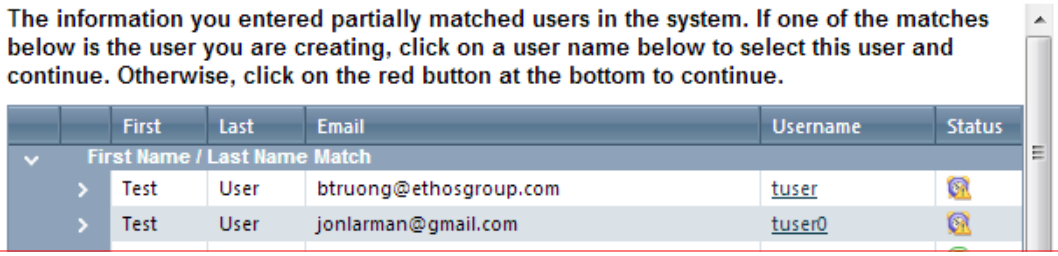
This category lists all employees' accounts loaded on the HR Online system. Functions that the company administrator can access includes: adding and deleting user accounts, transferring users between websites (if applicable), and unlocking accounts that have been locked out or expired.

Adding an Employee

To add an employee, click on the plus sign next to the category's title. This will open the user creation window pictured below. You will need to enter the employee's first name, last name, and e-mail address for password e-mails to be sent to. **We strongly encourage that all employees have their own e-mail address entered.** However if the user does not have a work e-mail address or declines to provide a personal one, please check the box underneath the E-mail field to indicate the user does not have one. Once this is complete, hit the Submit button.



***Note:** If a profile with information similar to what's provided is found, the system will alert you with the record found. <u>This will look similar to the picture below</u>. If this happens, please contact HR Online Website Assistance at **(866) 710 – 2135** for assistance.*



Choose Jobs & Abilities

Once the Submit button is chosen, this will prompt the Choose Jobs & Abilities screen as pictured below. The administrator will want to confirm the employment date populated (defaulted to the date of user's account creation) and input an employee number if the dealership would like to track. Then, the administrator will click on the plus sign next to the employee's department and choose the position title as appropriate. After this information is filled out, click the Continue button.

To provide this user access to the entire company's training reports, including incomplete training and training history information, check the Executive Reports option to provide this access. **Please be aware that anyone who has been assigned as an employee's manager will be able to access their employees' training information automatically.** This feature is more geared towards positions such as Owners, General Managers, Controllers, CFO, and other executive members of management.

Choose Managers

The administrator will then be prompted to the Choose Managers screen to be able to assign the employee to a manager. All websites in the organization will be listed - click on the plus sign next to the store that the manager is located at, and then again on the plus sign next to the title 'Other Employees'. This will bring up an alphabetical list of all active users at that store. Select a manager (or multiple managers) by clicking on the check box next to their name. Repeat this process as necessary if the user has managers on separate websites.

If the employee is of executive management status (such as an Owner or General Manager) and will be their own manager, check the button below all listed names that describes user as managing themselves.

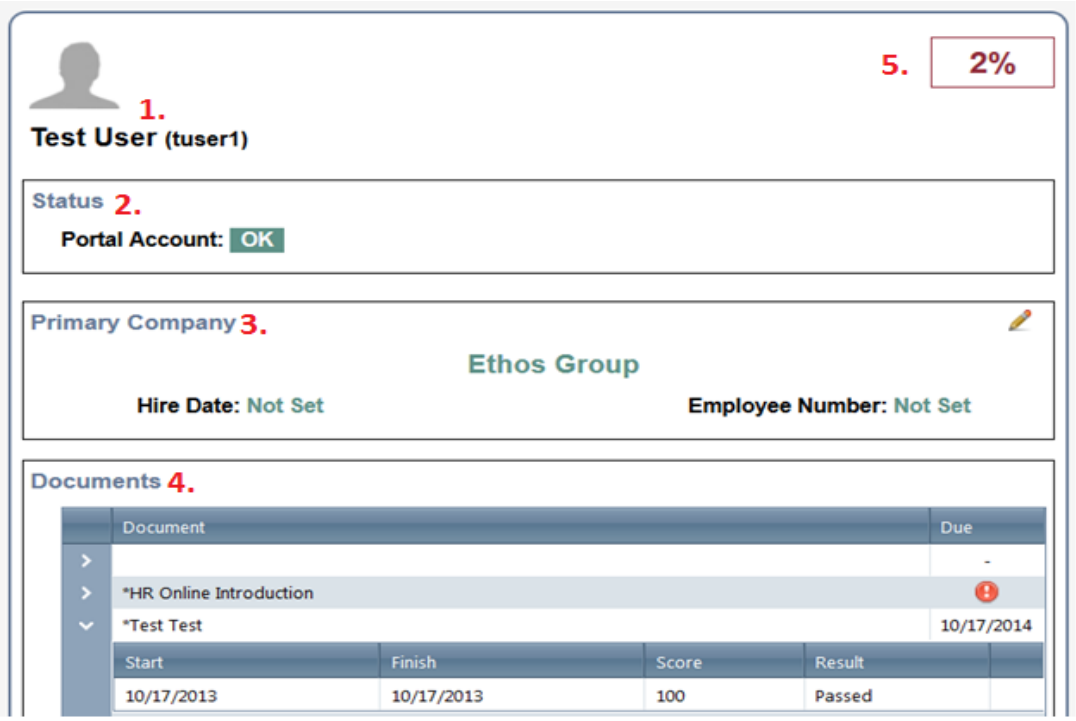
Create New User

Once the manager information is selected, click on the Create New User button. It may take a few moments to process the activation of this user. Please do not exit out of the setup screen until you receive a notification that shows the input was successful. Once an employee's account is created, their profile can be found under the Users category.

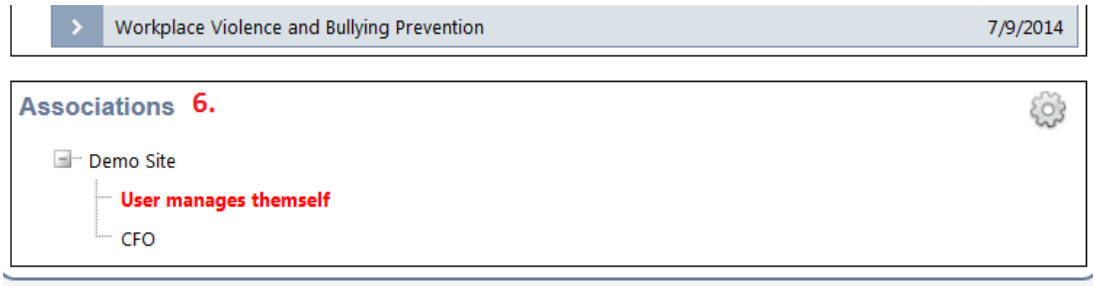
***Note:** If the box is checked on the first screen of the user setup that marks the employee as not having an e-mail address, an additional screen titled E-mail Liaison will pop up after the administrator chooses the employee's manager and clicks submit. This will list the employee's manager as well as all company administrators. Choose the person who you want their password reset e-mails to be sent to and click save Liaison.*

User Profile – Employee Account Information Updates and Password Resets

When an employee's name is clicked on from the Users category, their account profile will open in a separate window and will look like the one pictured.



Found at bottom of profile after Documents list:

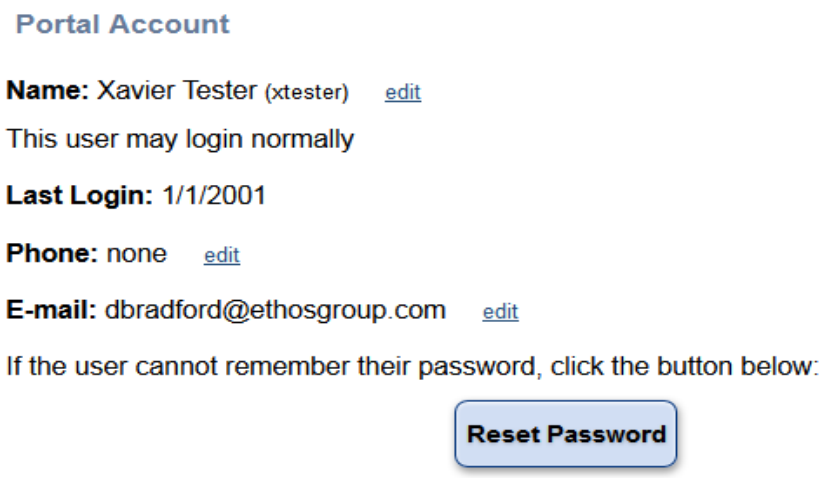


User Account Sections & Functions

1. **Name:** The user's first and last name, with their username noted in parentheses.

2. **Status:** This is where the status of the user's account is listed.
   Main Status Labels:
   - **OK**: Highlighted in green, means account is active and is in working status
   - **EXPIRED:** Highlighted in red, means user has not logged into system in over
   - **LOCKED:** Highlighted in red, means account has been locked due to too many unsuccessful login attempts (6+)

The employee's contact information on file is also located in this section. Clicking on the highlighted status will prompt the Portal Account dialog box to appear as shown below.



If a name or e-mail address needs to be updated, click on the Edit link located next to the respective information, update the field, and then click Save.

If a profile needs to be unlocked and/or a password e-mail sent, click on the Reset Password (also labeled Fix Portal Account) button. This will trigger the password notification to be sent to the e-mail address listed immediately.

***Note:** When an employee's account status is listed as EXPIRED or LOCKED and the Fix Portal Button is clicked (triggering the password e-mail), the account status will update to OK status. If the user's account page is exited and pulled back up **prior to the employee logging in with the new password**, the status will show as being reverted back to EXPIRED or LOCKED. This will update to OK permanently once the user logins and customizes their password.*

To view a list of inactive users, click on the icon of people with red minus symbol next to them:

To make an inactive employee active again, click on the user's name and follow the directions in the Modify User's Association section.

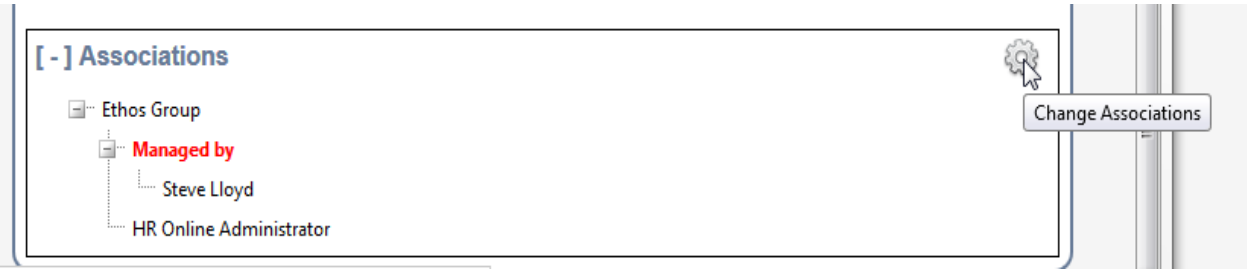
3. **Primary Company:** This area will show the user's default company they are assigned to, as well as list the Hire Date and Employee Number that was entered. You can edit either field by clicking on the pencil in the top right of the section.

4. **Documents:** This lists all documents and trainings the user's position title as been assigned. Documents will be listed and will have a dash (-) marked in the Due Column. Trainings will be listed under the same section but will have one of two indicators marked in the Due column. The first, depicted next to *HR Online Introduction, shows that a training is currently due. If you hover your mouse over the exclamation point, it will list the date it has been due since. The second, shown next to *Test Test, shows that the training has already been completed and lists the date the training is set to be released again. If you click on the arrow to the left of a completed, training a dropdown box will appear that lists the last time the training was taken as well as the score and outcome of the module.

5. **Compliance Percentage:** This compliance percentage is dependent on the number of trainings the employee is assigned versus what is currently outstanding. The entire store's compliance percentage is dictated by the average of all employees' ratings.

6. **Associations:** The Associations area lists any company the user is associated with and which job titles the user holds at each. Special permissions such as a user managing themselves or a user with Executive Reports access will be bolded in red.

The cog on the right side of the section will pull up the screen where administrators can update position titles or managers assigned, delete the user's account, or transfer to another location inside the organization.



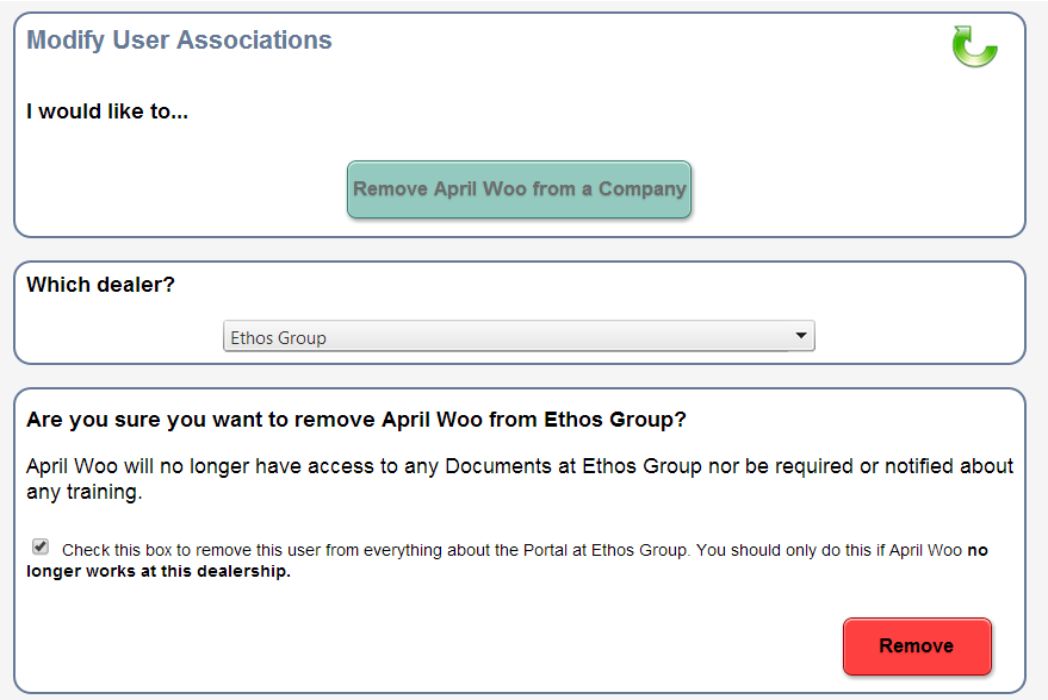
Once the cog is clicked, it will display the below modification options:

Modify User's Association with Company

To make an edit to the employee's position or manager assigned, you will need to select this option. This will route the administrator to the Choose Jobs & Abilities and Choose Managers screens as what was viewed during the initial user creation.

Remove User from Company

To remove a user from the store, you will need to select this option as pictured below. Verify the dealership you are removing the user from and then click the red Remove button.

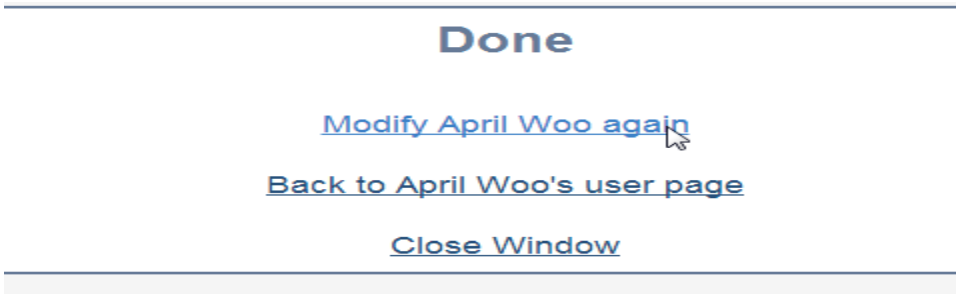


Associate User with another Company (Transfer)

To transfer a user to a new location inside the dealer group, follow the below directions:

1) Remove the user from their existing store (directions in previous section).

2) After Step 1 is completed, the below message will appear. Click on the 'Modify User again' option.



3) The Modify User Associations option will now appear. Click on the 'Associate User with another Company' option and the select the store the employee will be moving to. From this screen, the administrator will be taken to the Choose Jobs & Abilities and Choose Managers screens as what was viewed during the initial user creation. Once this information is selected, click the Submit button and the user will be assigned to the new website. **Please note that the user's training history will be moved over with the profile.** Only dealership customized trainings and trainings that the employee had not completed at time of transfer will be outstanding.

Category: Jobs and Departments

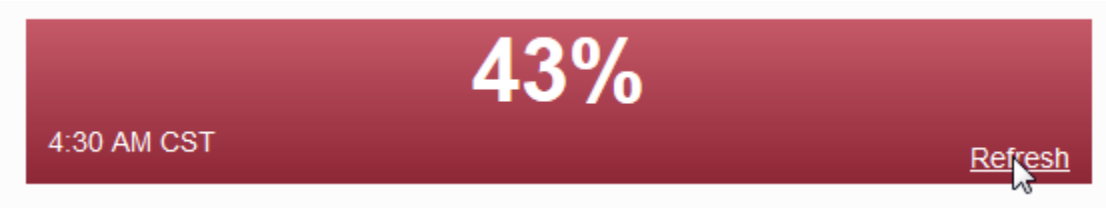
This category will give the company administrator an overall view of the active users at the store filtered by department and position title. If an employee's name is clicked on in this view, the user's account page will open in another window.

Category: Managers

This category will provide the administrator a snapshot of current manager association at the dealership. Managers marked with an asterisk are currently listed as managing themselves.

Category: Training Completion Percentage

The percentage located in the red box on the right side of the Dashboard displays the store's training completion percentage. This number automatically updates daily at 4:30A CST, but can be refreshed to update to the current percentage for the store. **Ethos Group Compliance Solutions strongly recommends that this rating remains higher than 96% on average.**



Frequently Asked Questions

Q: Who can employees contact for login help if the Company Administrator is unavailable?
A: Employees can contact IT Support at (214) 273 – 1275 (option 1) or e-mail passwordreset@ethosgroup.com.

Q: Who can the Company Administrator contact for website assistance?
A: Company Administrators can contact Website Assistance at (866) 710 – 2135 or webhelp@ethoshronline.com.

Q: An employee did not receive their initial welcome e-mail or a password reset e-mail I sent. What should I do?
A: First, advise the employee that the e-mail will be coming from 'Portal Admin' and that it may have been filtered to their Spam or Junk folder. Next, check that the employee's first and last name is spelled correctly in their profile. Also check to see if the e-mail address entered is the one the employee would like to use and if so, check if the address is spelled correctly. Have another e-mail sent and see if the second e-mail reaches the employee. If it is still not coming through, have the e-mail sent directly to you and inform the employee of the temporary password. If all steps are followed and you are having issues receiving the password e-mail as well, please contact HR Website Assistance.

Q: When an employee's account status is listed as 'Expired' or 'Locked' and I click the Fix Portal Account button, the account status updates to show as 'Ok'. If I exit the user's account page and re-open it, the status looks to have changed back to 'Expired' or 'Locked'.
A: When an employee's account status is listed as EXPIRED or LOCKED and the Fix Portal Button is clicked (triggering the password e-mail), the account status will update to OK status. If the user's account page is exited and pulled back up **prior to the employee logging in with the new password**, the status will show as being reverted back to EXPIRED or LOCKED. This will update to OK permanently once the user logins and customizes their password.

Q: How do you transfer an employee?
A: Please refer to the steps in the *Associate User with another Company (Transfer) section.*

Q: What happens if an employee's last name changes?
A: Access the user's account page under the Users category and click on the highlighted status of the employee's account. This will pull up a smaller dialog box – the first field will include the user's name with an Edit link to the right of it. Click on the edit link, update appropriately, and click Save. Please note that this will not change the employee's username. If the employee would like their username updated as well, please contact Website Assistance.

Q: If an employee has two open accounts, can they be merged?
A: Yes. Please contact Website Assistance to merge the separate accounts.