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Introduction to ResourceLink & Cognos reports

This Work Instruction gives an introduction to ResourceLink and to Cognos reports. Please refer to other relevant work instructions for how to carry out specific tasks. Related work instructions include:

- Using ResourceLink to record annual leave

- Using ResourceLink to record sickness absence

- Using ResourceLink to record other absence (i.e. absence which is not leave or sickness)

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1   How to access ResourceLink on your pc

ⓘ Only staff who have requested and been authorised to have access to ResourceLink will have the software available to install on their computers.

ⓘ Once authorisation has been approved, the HR Business Support team will arrange for iSolutions (formerly ISS) to remotely deploy the software to your computer.

ⓘ Once this has happened, the next time you shut down your computer and then turn it on again the software will install.

1.1   If you click on your **Start** button you should find that the software is then listed under **All Programs:**
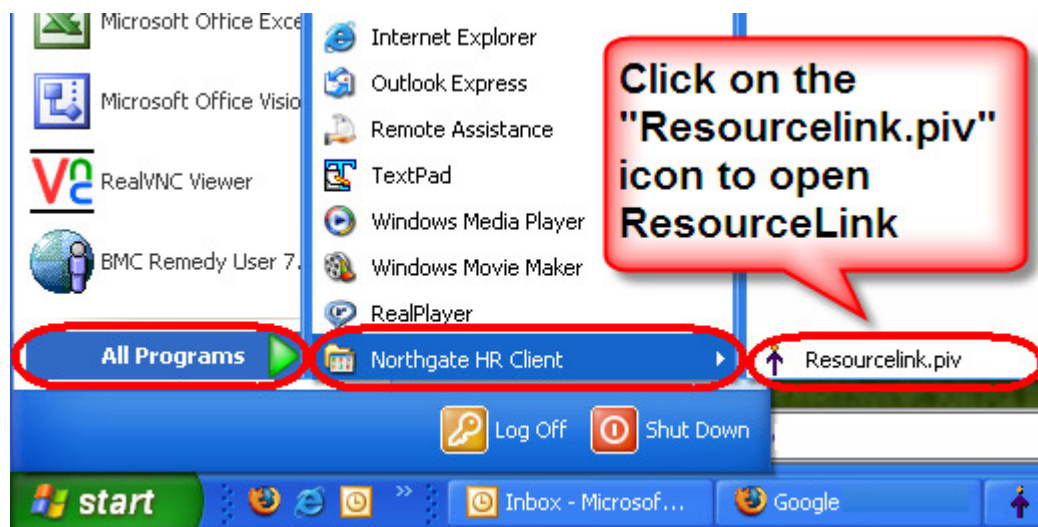
How to log in to ResourceLink

ⓘ To log in to ResourceLink you need a ResourceLink password. You will be given these at your ResourceLink training.

💣 Please note: you will not be able to log in to ResourceLink using your normal computer network log in password.

1.2   Open up ResourceLink by clicking on your **Start** button, then locating **Northgate HR Client** from the list of programmes available and clicking on the **Resourcelink.piv** icon (see diagram under section 1 above). You should see the ResourceLink log in screen:
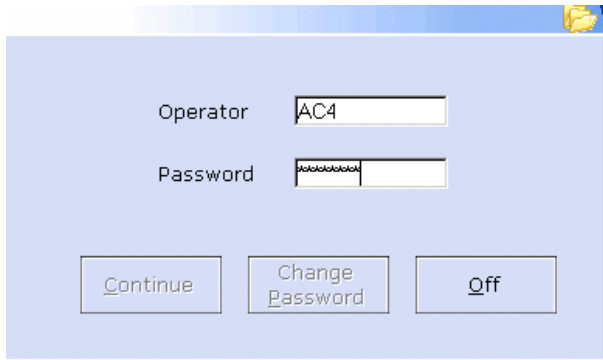

1.3   In the **Operator** field enter your computer network username.

1.4   Press the **Return** button on your keyboard to move into the **Password** field.

💣 Note: you cannot use **Tab** on your keyboard. Pressing the **Tab** key will result in the following error message being displayed:
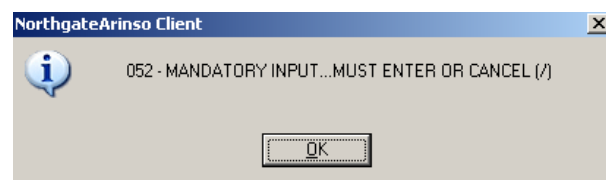
Click **OK** to return to the log-in screen.

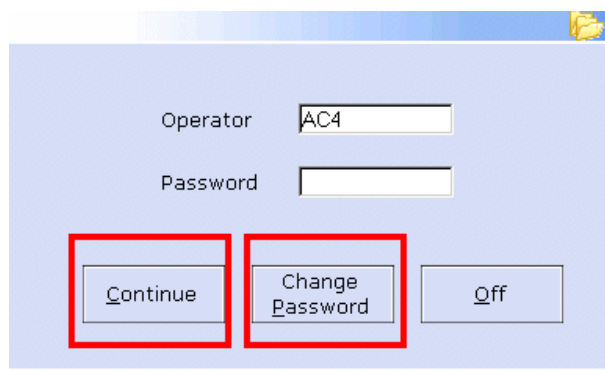1.5   Now enter your ResourceLink password in the **Password** field:

1.6   Press **Return** on your keyboard.

☙ Note: when you click on **Return**, the information you entered in the **password** field will disappear, however the **Continue** and **Change Password** buttons become valid:

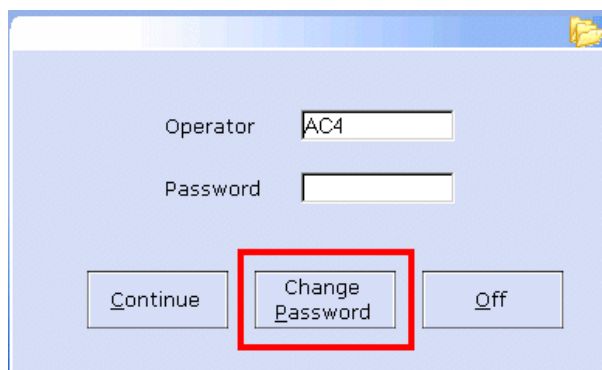1.7   Click on **Continue** to start using ResourceLink or click on **Change Password** to change your password.
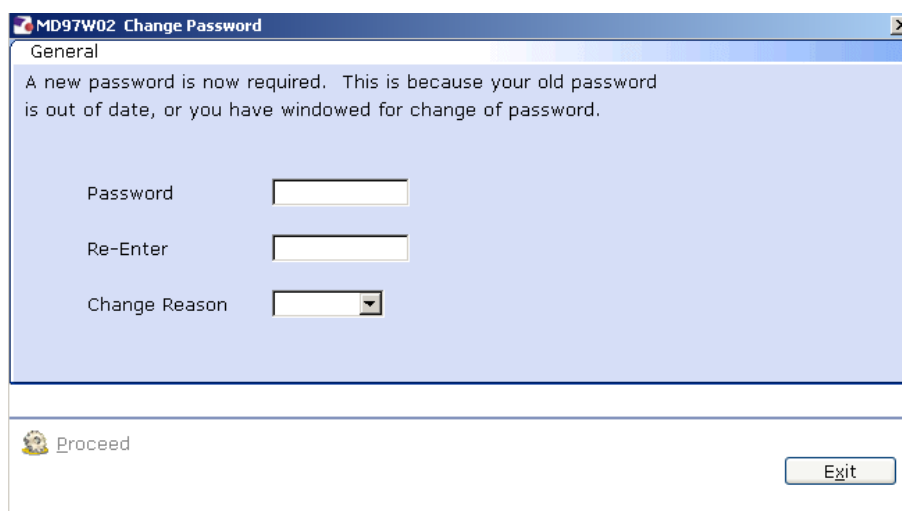
2   Changing your ResourceLink password

ⓘ You will be required to change your ResourceLink password every 90 days. The system will prompt you when you need to change your password. However you can to change your password at any time you like when you log in or out of ResourceLink. To do this:

2.1   When you have logged on to the system, but before clicking the **Continue** button, click on the **Change Password** button.

2.2   The following screen will be displayed:

2.3   Type in the new password in the **Password** field.

💣 Your password has to be 8 characters long, with at least one number in it.

2.4   Click into the **Re-enter** field and retype the password.

💣 The text markers disappear when you click into the next field.

2.5   Select a password change reason from the drop-down list:

The most suitable reason will usually be the **Time Expired** reason.

2.6   Click on the **Proceed** button on the left to change the password.

2.7   To return to the log-in screen *without* changing your password, click on the **Exit** button.

2.8   You can then press **Continue** to start using ResourceLink, or **Off** to close the application down.

3   How to open an employee's record
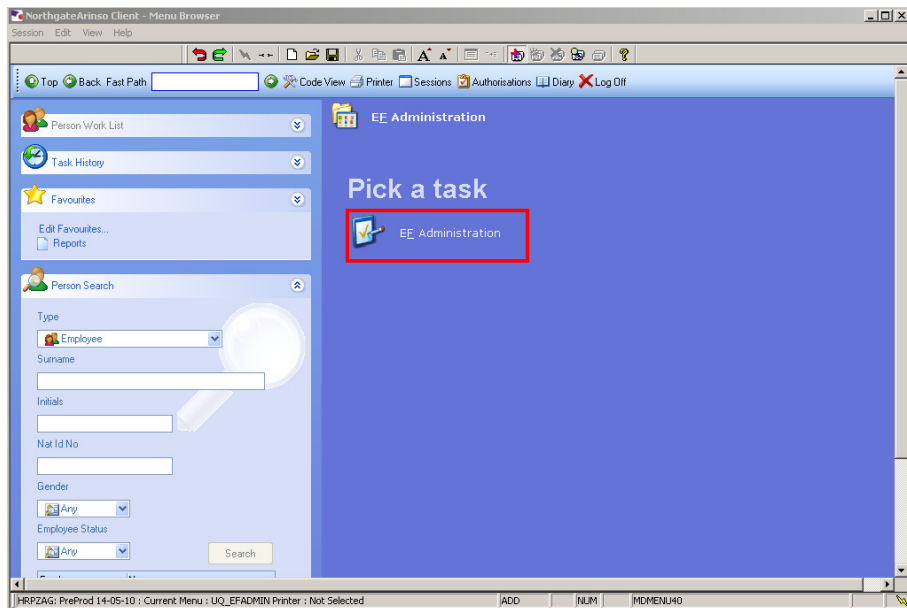
3.1   From the home screen, click on the **EF Administration** task.

3.2   The following screen will appear:

3.3   The following search form is made available

3.4   The Employee Number, Surname, search and select options are highlighted

3.5   Entering either the Employee Number or Surname select search.

3.6   Select the appropriate staff member from the list

ⓘ You will only have access to records of staff working in Estates & Facilities.

ⓘ If you enter a surname, which more than one Estates & Facilities staff member holds, then the following screen will appear, whereupon you simply click on the record you are interested in and then click on the **Select** button:

💣 You may get the following information pop-up message if/when Payroll are processing pay – just click on the **OK** button to continue:
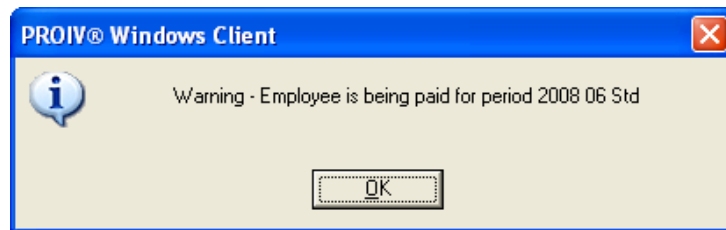
3.7 The **Absence Details** screen will now open, showing any absence details for the person you have selected.

ⓘ This screen will show a row for each annual leave request, each period of sickness absence or any other period of other absence that the person has had. Therefore each employee's **Absence Details** screen will show more information over time.

💣 Please refer to the separate work instructions to learn how to record annual leave, sickness absence or other types of absence.

## 4   Logging off ResourceLink when you have finished using it

ⓘ When you have finished a work session on the system, you must log off to prevent unauthorised access to HR data.

💣 **Note:** Failure to log off in the recommended manner can cause loss of data and/or create a security risk. **Do not** just turn off your PC.

To log off after using ResourceLink:

4.1   Return to the ResourceLink main menu.

4.2   Click on the **Log Off** button – this will terminate your connection with the database server. Simply clicking on the usual red/white cross icon does not sever your connection with the database and can lead to problems:
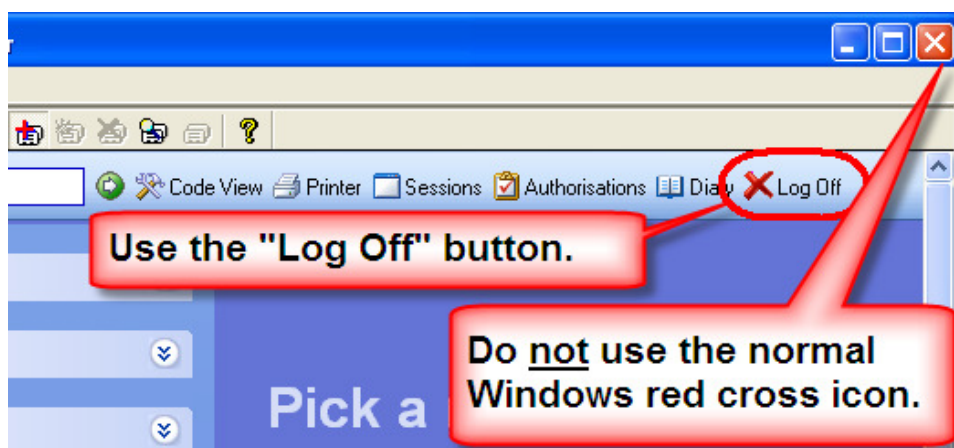

4.3   The ResourceLink log-in screen is displayed:
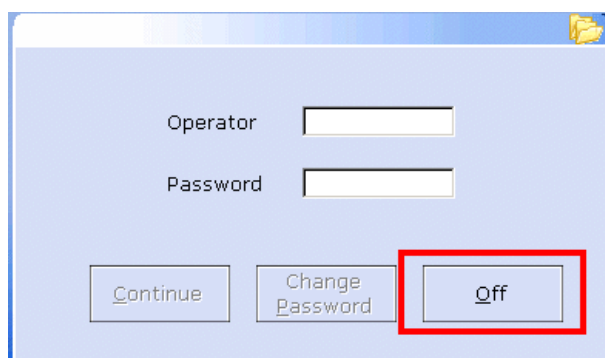
4.4   Click on the **Off** button.

4.5   ResourceLink PRO-IV closes and the Windows desktop is displayed.

5   How to access Cognos reports

Access to Cognos reports is through your normal log on in the ResourceLink system.

5.1   Log into ResourceLink.

5.2   Click on the **Reports** link found in the **Favourites** area of the **Control Panel** on the left hand side of your ResourceLink **Home Page**.
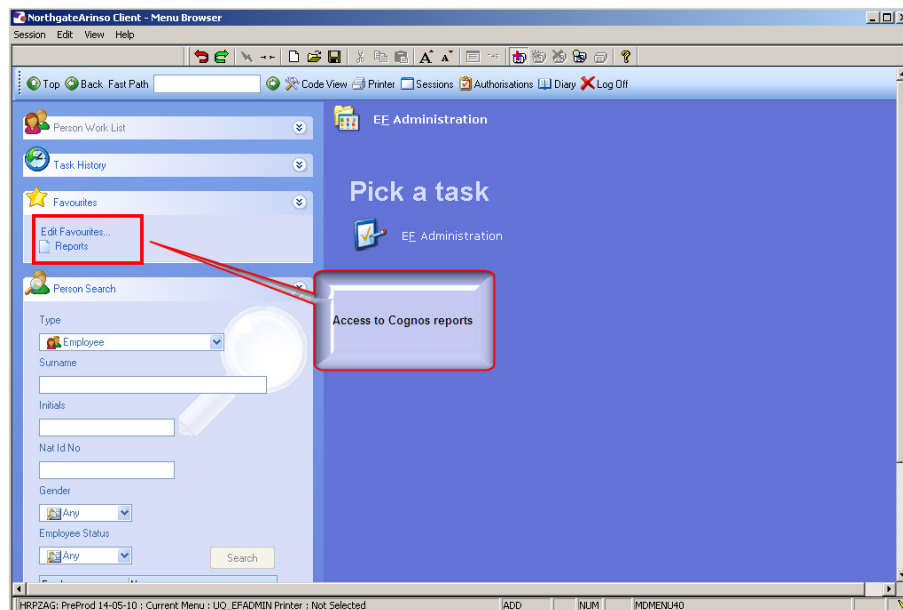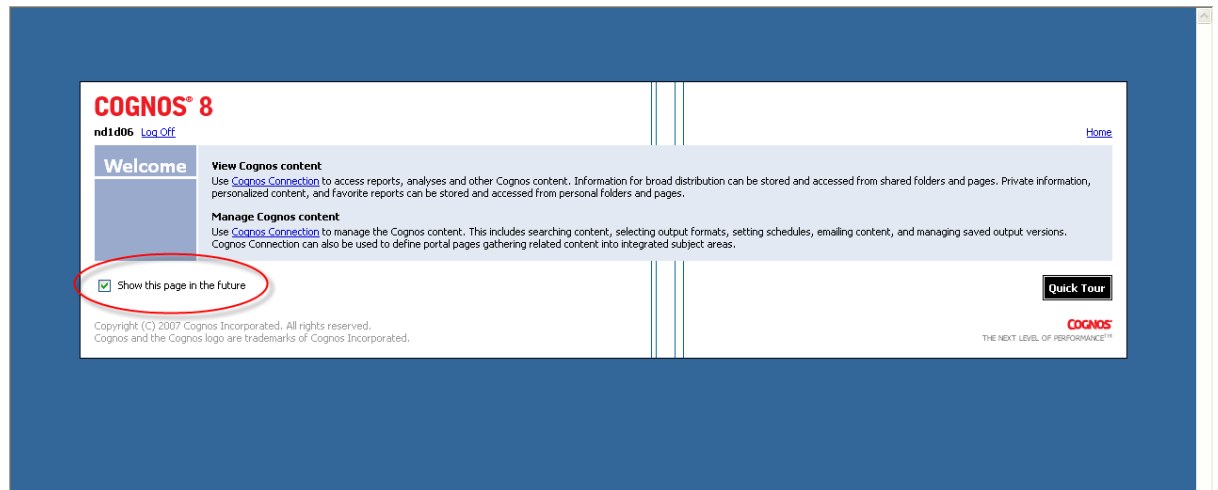

♠   Depending on your web browser settings, the following warning box may appear:
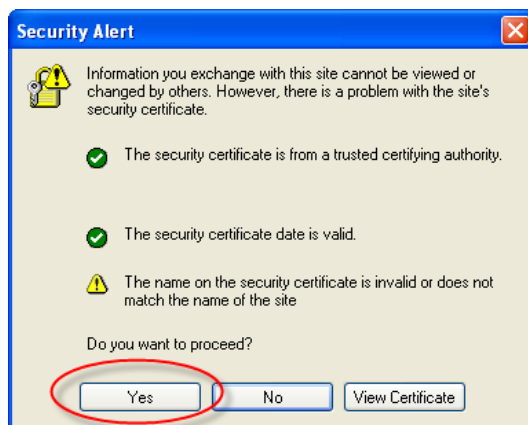

5.3   If it does, click on **Yes**.

The following Cognos screen will appear:

5.4 This screen appears each time you log on to the Cognos reports unless you un-tick the box labelled "**Show this page in future**, so it is worth un-ticking this box the first time you ever log in to Cognos.

5.5 Your **Operator** log in will be shown at the top of the screen next to the link that enables you to **Log Off**
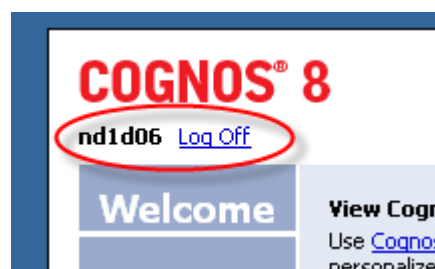
5.6 To enter and view the reports, click on the **Cognos Connection** link under **View Cognos Content**.
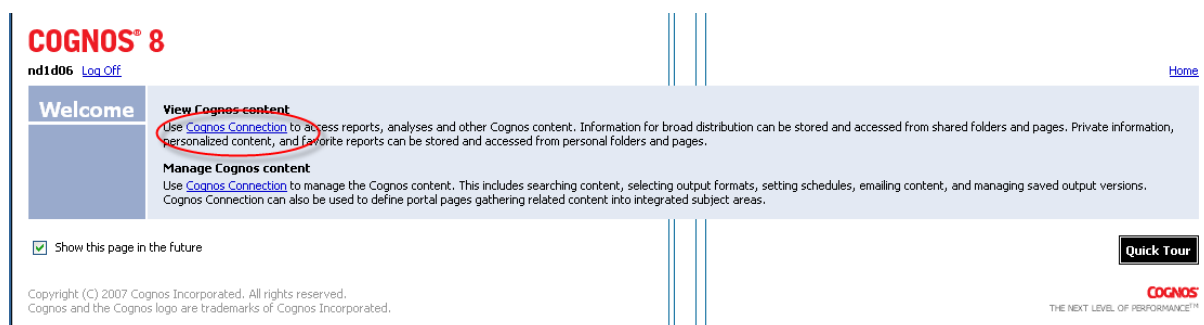
5.7 You will now see the Cognos reporting homepage:
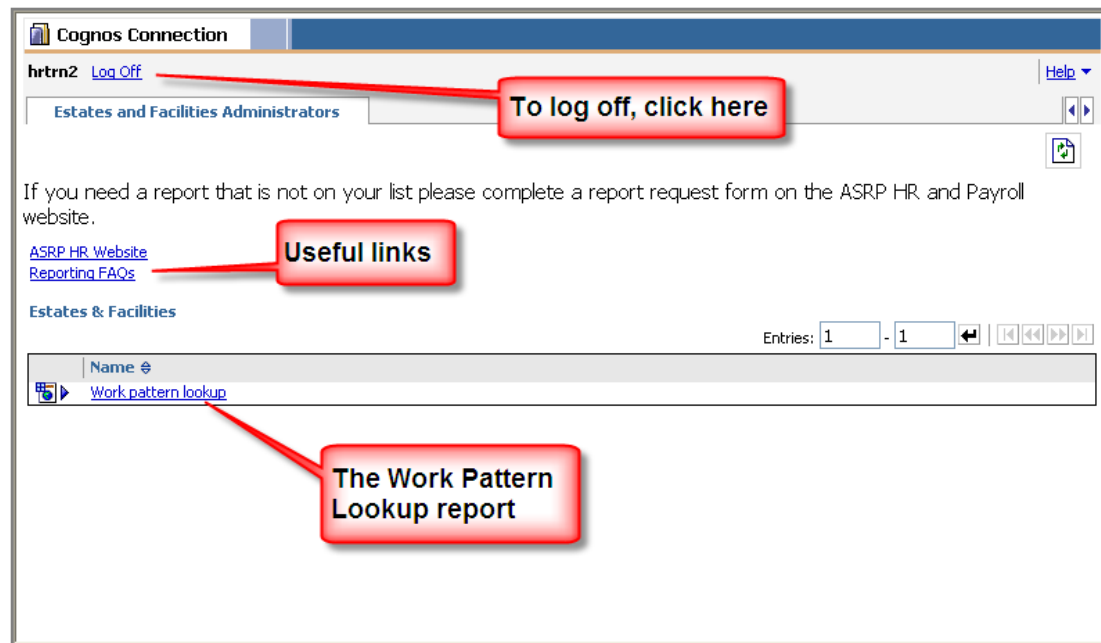
As you will see, you have the **Estates and Facilities Administrators** reporting tab and this contains one report: the **Work pattern lookup** report.

- ⓘ When you have finished using Cognos, simply click on the **"Log Off"** link at the top-left of the screen.

- ⓘ There are a couple of links listed which provide some additional generic information about reports.

- ⓘ Please refer to the following section of this work instruction for details about using the **Work pattern lookup** report.

6   Using the Employee Work Pattern report

6.1   From the Cognos homepage, simply click on the title of the report you wish to run – in your case click on **"Work pattern lookup"** report:

💣 Depending on your web browser settings, the following warning box may appear:
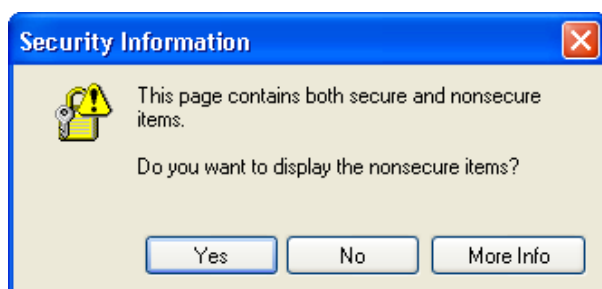
6.2   If it does, click on **Yes**.

6.3   You will now see the following screen:

6.4   Insert the employee's number in the **Employee Number** field.

6.5   Click on the **Insert** button to move the employee's number across to the **Choices** field.

ⓘ   Note, you can lookup more than one employee at a time by repeating steps 7.4 and 7.5 so that there are multiple numbers in the **Choices** field.

6.6   Click on the **Finish** button.

6.7   After a few seconds the Work pattern lookup report should open, showing the work pattern of the employee you have selected:

☀ **This Work Pattern Lookup report will show the following information:**

The employee's number and name
The post location (that is, which School / Department and division they work in)
Their post number and title
The short and long description of the work pattern they have on their HR record
The details of this work pattern (showing day and start and end times)

6.8   This information may be useful to you when you record periods of annual leave and / or sickness absence for an employee.

6.9   Once you have viewed the information about this employee's work pattern, you can return to the Cognos home page by clicking on the **home** icon located at the top-right of the page:
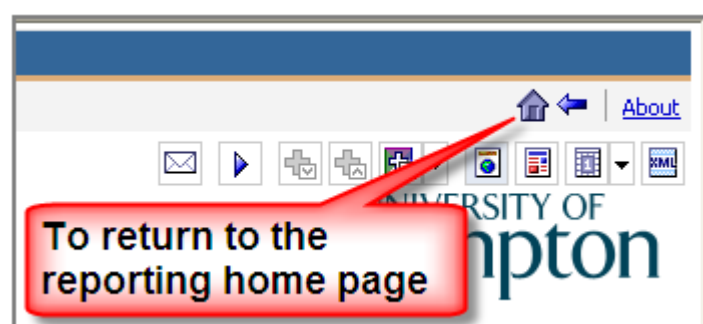
7   Logging off after using the Cognos reporting tool

7.1   Click on the Log Off icon at the top of the screen.

The following screen will be displayed:
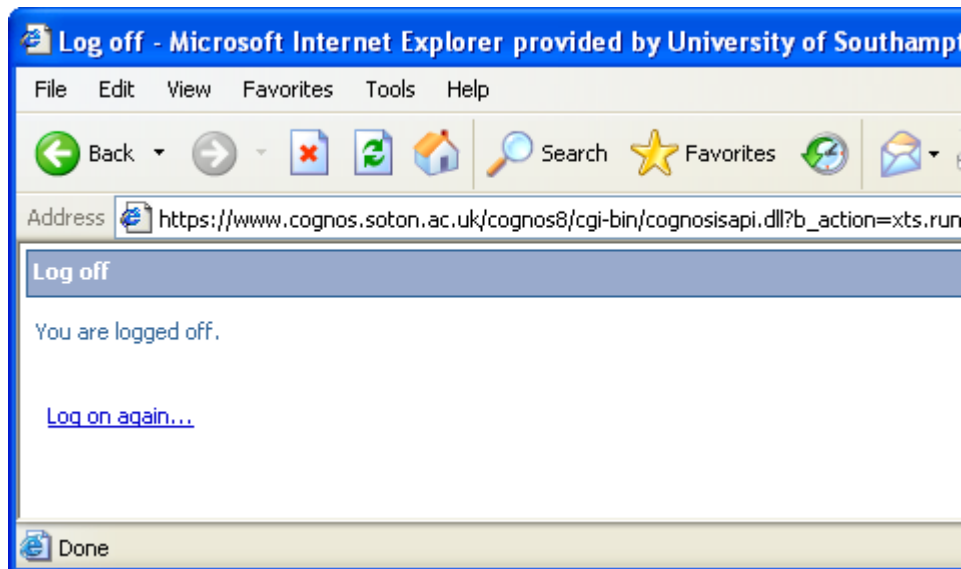
7.2   If you want to log in again, simply click on the Log on again... link.

    ⓘ   You will then be taken back to the initial screen to enter the system.

7.3   If you have finished using Cognos, click on the white cross in the red box to close the Web Browser window.