

	<b>HRA – Managing Shape Contract Associates V2</b>	
<b>Document Number:</b>	HRT-1038213-US	<i>Page 1 of 11</i>

**Introduction:**

There are a variety of tasks associated with managing Shape contract associates.

Each is outlined here in the typical sequence of events, with the pages referenced for easy access. All are found by logging into our ERP system, **cloud.plex.com**.

<b><u>Task</u></b>	<b><u>Page(s)</u></b>
Accessing Plex .....	2
Adding/Updating Associate Accounts .....	3 – 5
Associate Safety Training .....	6 - 7
Printing Associate Badges .....	8 - 11

**NOTE:** Contract associates will normally be using their badges to punch in and out through our time clocks and to log into our MFG control panel for performing their daily tasks. They will not be required to use their own Plex login credentials for either of those things.

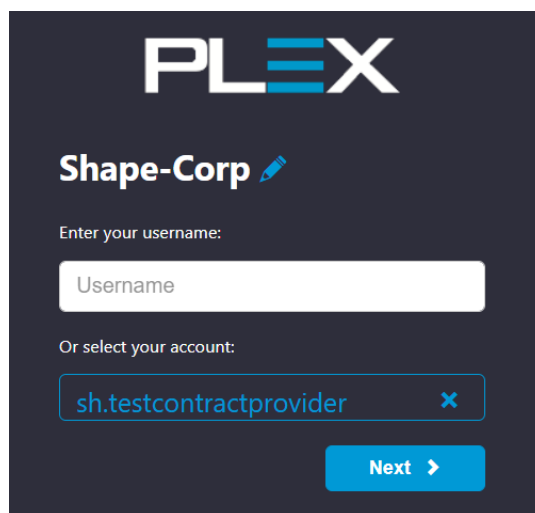
You will still be creating a Plex login account (sh.temp....) as their unique identifier.

If their job tasks differ and the use of that Plex login will be required, Shape internal staff will reset the password for them and will have them confirm access at that time.

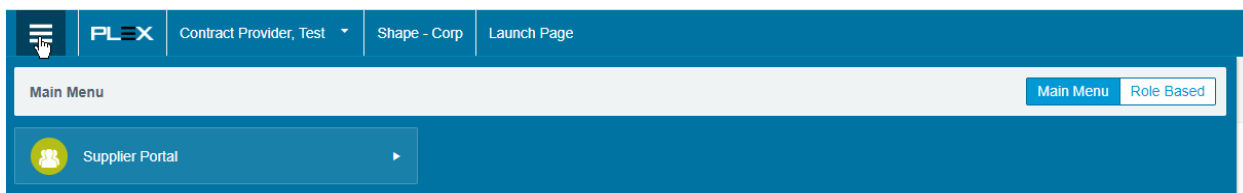
	<b>HRA – Managing Shape Contract Associates V2</b>	
<b>Document Number:</b>	HRT-1038213-US	Page 2 of 11

## Accessing Plex

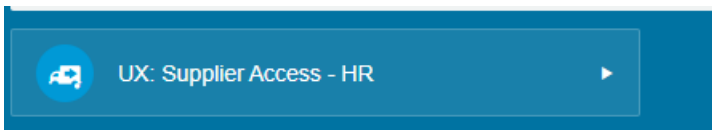
1. Navigate to Plex using the link: [cloud.plex.com/sso](https://cloud.plex.com/sso)
  - a. Save that as a bookmark for easy access if you wish
2. Log into Plex with:
  - a. Your home company code
    - i. Grand Haven: Shape-Corp
    - ii. Trenton: Shape-Magnode
    - iii. Athens: Shape-CST
  - b. Your Plex login
  - c. Your password



3. Click the 3 bars in the upper/left corner, and then choose 'Role Based' on the right. The current 'Supplier Portal' option also works but does not currently contain the badge printing. All necessary items are under the Role Based menu.



4. Choose UX: Supplier Access – HR



5. Specific functions are listed on the following pages

### Adding Associate Accounts

1. Navigate to '**Contract Employees**'.

The screenshot shows the 'Contract Employees' search page. It includes a top navigation bar with 'PL-X', 'Contract Provider: Test', 'Shape - Corp', and 'Contract Employees'. Below this are several filter rows: Status (Active), Pay Type (All, Salary, Non-Salary), Curr Hire Date, Shift, Building, Employee Type, First Name, Supplier (Sister Co. Temp), Department, Position, Reports To, and Employee/ADP File No. A search button is located at the bottom right of the filter area. Below the filters is a table header with columns: Last Name, First Name, User ID, Curr Hire Date, Contracted Employee Start Date, Building, Reports To, Shift, Employee/ADP File No., Department, Position, Assignment, and Office Phone.

2. Click '**Add**' to add a new user account.
3. On the left side of the screen, populate the following fields:
  - a. User Id will automatically increment
  - b. Password will be randomized (will be reset later if necessary)
  - c. Populate First name, last name**
  - d. Employee/ADP File No will automatically increment
  - e. You will come back to 'Badge No' later in the process
  - f. Contract employee and your agency will be automatically populated
  - g. Enter contract starting date**

The screenshot shows the 'NEW EMPLOYEE' form. It has a 'Print' button at the top left. The form is divided into two main sections: 'NEW EMPLOYEE -' and 'PERSONAL INFO -'. In the 'NEW EMPLOYEE -' section, there is an 'Existing User' search field, an 'OR' separator, a 'User ID' field with the value 'sh temp13508' and a 'Check' link, and a 'Password' field with the value 'yVJszlLS\_'. In the 'PERSONAL INFO -' section, there are fields for 'First Name', 'Middle Name', 'Last Name', 'Common Name', 'Generation' (No Value Selected), 'Employee/ADP File No.' (TEMP13508), 'Badge No' (018089), 'Marital Status' (No Value Selected), 'Birth Date', 'Contracted Employee' (checked), 'Supplier' (Sister Co. Temp), and 'Contracted Employee Start Date'.

4. On the right side of the screen, populate the following fields:
  - Status will default as 'Active'

	<b>HRA – Managing Shape Contract Associates V2</b>	
<b>Document Number:</b>	HRT-1038213-US	Page 4 of 11

- Populate **Curr Hire Date** with the same as the Contract Start Date
- You will come back to the Door Key ID later

**EMERGENCY CONTACT -**

Emergency Note

---

**STATUS -**

Status \*

Curr Hire Date

Corp Hire Date

Next Review

Next Review Form

Eligible for Rehire

Vacation Override

Door Key ID

Key Fob Active

Key Fob Additional Security

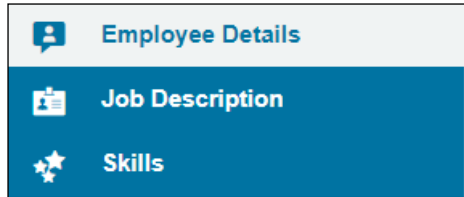
Passcode/First Man

5. Click one of the following:

- **Apply** will save the record and leave you in that screen for your next step
- **OK** will save the record and then exit back to the list
- **Next** will save the record and then clear the screen for addition of another user
- Next can be helpful if you are adding multiple records
  - o Remember to go back in for each and complete, see Job Description below
  - o You will not be able to print a badge without information on that page

[Cancel](#)

6. In the left panel, click '**Job Description**':



7. The Job Description page will open, allowing you to populate the fields on the left side of the screen:

- **Department** (work center to which assigned)
- **Position** (normally 'General Labor', but may differ)
- Accept position security defaults
- **Shift** (default shift for which they are to be scheduled)
- **Work Schedule** (if you see it below the shift, populate the same as shift)
- **Building** (building to which they are assigned)
- **Reports To** (supervisor or manager to whom they are assigned)

8. Click '**Apply**' in the bottom right corner to continue, and typically, complete the add.
9. If the person will be considered 'Salaried', make that change on the Payroll tab.

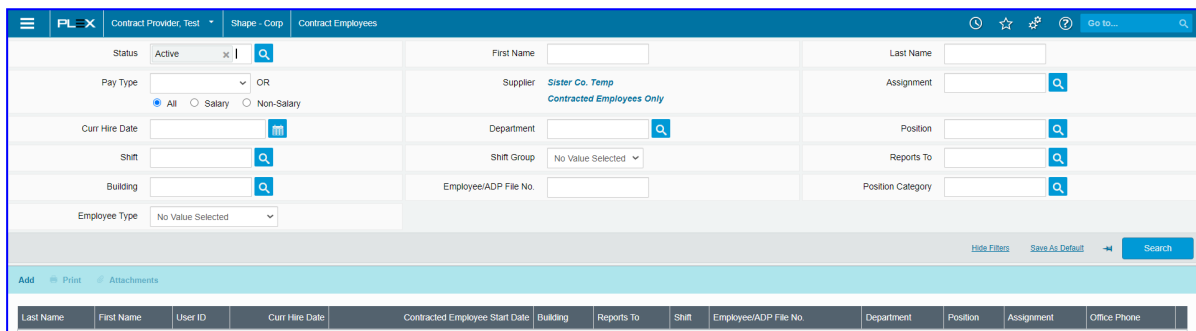
### Associate Safety Training

#### SHAPE-SPECIFIC SAFETY TRAINING IS REQUIRED OF ALL CONTRACT ASSOCIATES.

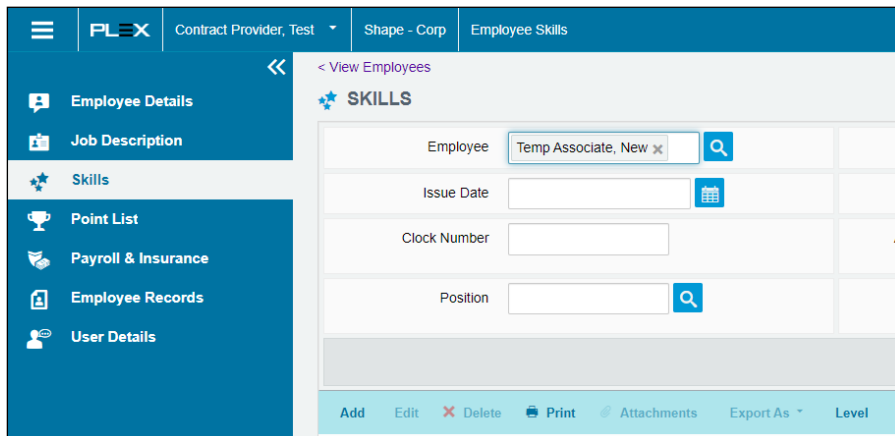
1. Navigate to our corporate website, <https://www.shapecorp.com>
2. You will find the links to training videos in this area in the Supplier section, more instructional documents will be added as we move forward:



3. The associate is required to view both videos and then sign an acceptance sheet.
4. Upon receiving the signed acceptance, the record of training must be entered into our training system for reference.
5. Navigate to **Contract Employees**:



6. Search for the associate, then click the name link to open the record
7. In the left pane, click on **'Skills'**:



	<b>HRA – Managing Shape Contract Associates V2</b>	
<b>Document Number:</b>	HRT-1038213-US	Page 7 of 11

8. Click **'Add'** and then populate the following:
  - a. **Employee** = find the associate (it does not default)
  - b. **Skill** = SF05
  - c. **Skill Level** = choose 'Certified'
  - d. Issue Date will auto-populate as current date but can be changed
  - e. Issued By will show as your name but can be changed
  - f. **Note** = 'Signed Document Attached' or 'Available Upon Request', see below

9. Click **OK** to save the change.
  - a. Note that this screen has 'Add & New' if you are adding multiple.
  - b. Remember that you would then still have to go back to each and scan/attach.
10. **It is preferred to scan and attach the signed copy, but also acceptable to note as 'Available Upon Request' as long as the forms are available if the need arises.**
11. **Search** for the associate/record again and click the **paperclip** on the far right.
12. **Scan** and **attach** a copy of the signed acceptance.
13. **Provide** the associate with a copy to bring to NHO (TBD).
14. The skill record must be in place before the associate arrives on-site for work. It will be verified, and the person may be asked to repeat the training if unsubstantiated.
15. Note that 'Employee Skills' is also an item on your menu and can be used if you are adding skills/forms for more than one associate.
16. There is also a skill record upload available if it better fits your process to add the skill records as a list at the end of each day. A format and specific training can be provided as needed.

	<b>HRA – Managing Shape Contract Associates V2</b>	
<b>Document Number:</b>	HRT-1038213-US	Page 8 of 11

## Printing Associate Badges

Associate badges are necessary for:

- Security Identification
- Timeclock Entries
- In some building locations, door system security

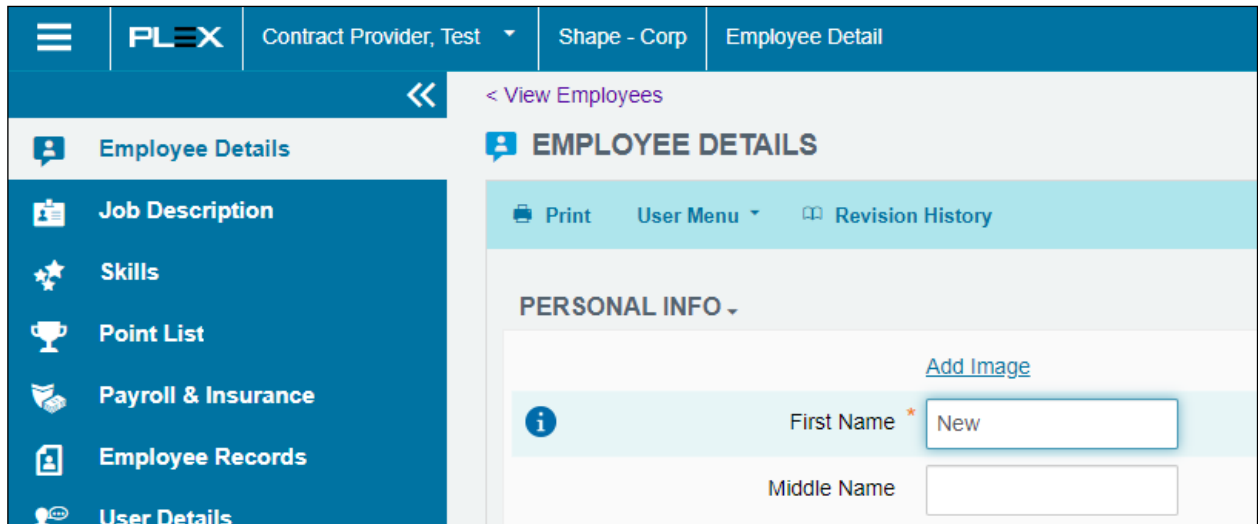
The badge printer currently in use is a Fargo DTC4500.

The badge stock is typically purchased from Engineered Protection Systems.

Ribbons, cleaning kits, and a badge punch device are available online.

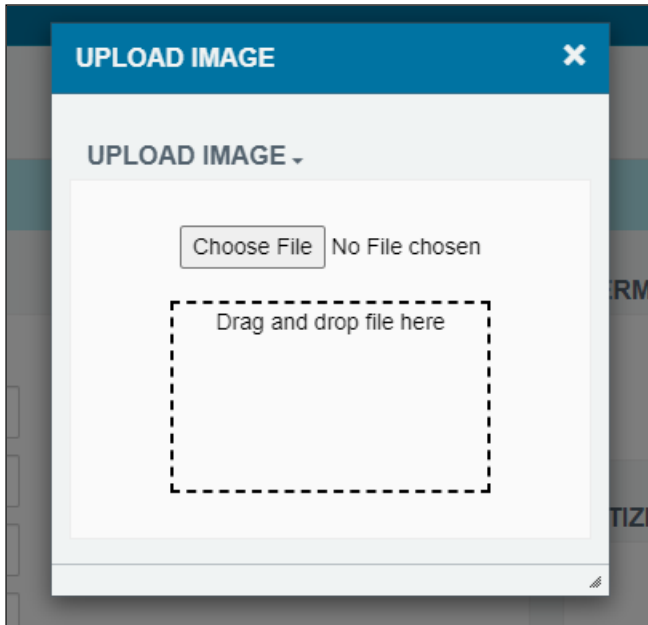
## Upload the Picture

1. Take the associate's picture, with a yellow backdrop indicating contract.
2. The orientation should be horizontal, not vertical.
3. Perform any necessary cropping or other editing.
4. Navigate to the **Contract Employees** screen.
5. Find your associate, click into their record.
6. From the main 'Employee Details' page, you should see an '**Add Image**' link.



7. Click the '**Add Image**' link
8. **Choose** or **drag-n-drop** the image file, verify, and then click '**Upload**':





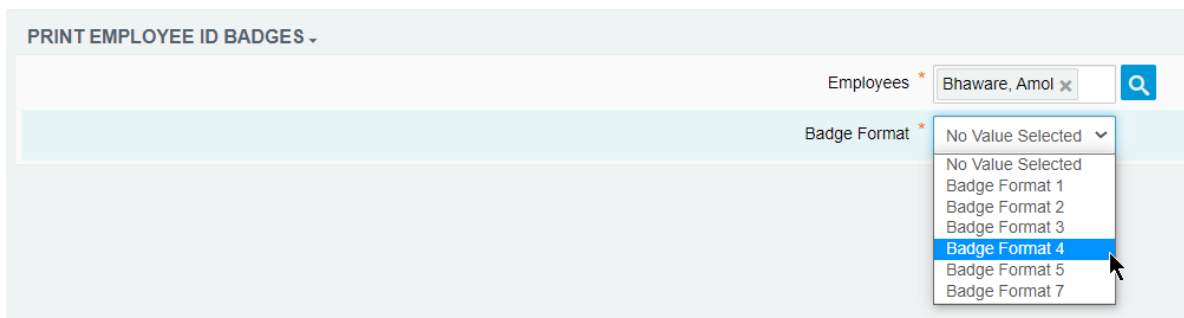
9. The result will look something like this:



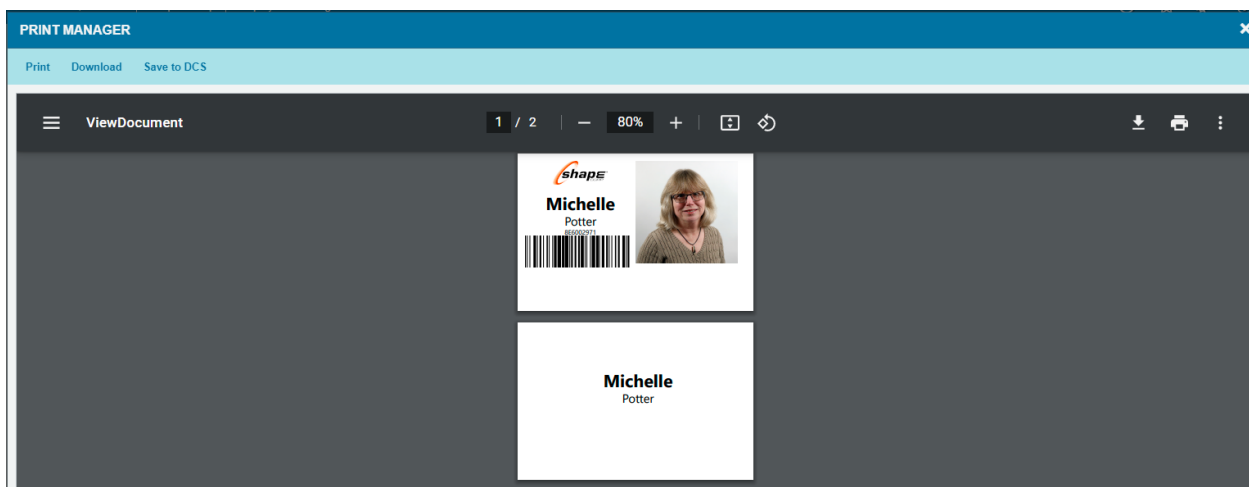
10. Click **OK** to save the associate record.

### Print the Badge

1. Set the Fargo printer as your **default printer** and verify that stock is loaded.
2. Navigate to **'Employee ID'**.
3. **Search** for your associate by name
4. Choose **Badge Format 4**



5. Click the **'Print'** link in the upper/left corner, and the badge will display on the screen. Click the **printer icon** to continue the process.



6. When the print dialog comes up, change the pages to **'Custom'** and enter **1** in the box. The second page is intended to print on the back of the badge, which is not needed and not printing it will save both time and ribbon.
7. If you wish, punch the badge **ONLY AT ONE OF THE TWO MARKS ON THE BACK**. If you punch the badge in any other location, the internal wireless antenna will be broken and the badge will not function on the readers.

	<b>HRA – Managing Shape Contract Associates V2</b>	
<b>Document Number:</b>	HRT-1038213-US	<i>Page 11 of 11</i>

### Update the Badge Number

After you have printed and verified the badge, the number needs to be updated into two fields in Plex. The update is done with a small swipe reader (provided), to also confirm that the wireless antenna inside of the badge is working.

1. Plug the USB swipe device into your computer.
2. Navigate to '**Contract Employees**'.
3. Search for your employee and click the link to open the record.
4. Click your cursor into the '**Badge No**' field near the top of the screen and **erase** whatever might have defaulted there when the account was created:

Generation	No Value Selected ▾
Employee/ADP File No.	TEMP13508
Badge No	018089

5. **Wand the badge** over the reader, and you should hear it beep.
6. The badge number will populate into the field (ex. 111222), used by the timeclocks.
7. Flip the badge over and **verify** – it should be the same as what is printed on the badge, **minus** any leading zeros that may show on the physical badge (they are printed on the back but are NOT actually inside of the card).
8. Scroll down, and click into '**Door Key ID**', **repeating the swipe process** to populate the field used by the door security system.
9. Click '**OK**' to save your change. An email will be automatically sent to our door security company for activation of the badge.