

Hudson Client Portal

(Powered by Astute)



Approvers guide to using the
Hudson Client Portal

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Overview

The Astute Client Portal is a cloud based solution that represents a significant and exciting technology update from Hudson and will ensure that the Timesheet/Expense/Leave review and approval functions are simple and efficient.

The Client Portal enables you to update your details on an ongoing basis, review information about your Temporary Staff and Contractors as well as receive news and updates from Hudson in a central location.

The '**Dashboard**' is your Home Page and provides a summary of your Temporary Staff and Contractor(s) and Client Profile details.

The following User Guide to the Client Portal will provide Primary and Secondary Approvers with simple instructions on how to navigate through the new system and will transform the ease and efficiency with which you engage with Hudson.

- A **Primary Approver** is the main person responsible for approving time worked/business related expense claims and leave (only for New Zealand Temporary Staff and Contractors).
- A **Secondary Approver** is an alternative Approver in the event that the Primary Approver is away or unavailable.

As an Approver, the system not only enables you to approve Timesheets and Expenses by email or online, but also provides you with access to your dashboard and reporting specific to the Contractors and Temporary staff assigned to you.

Bulk approvals are now a simple process that enable you to manage multiple Temporary Staff and Contractors. The Client Portal also provides a simple view of the Temporary Staff and Contractors assigned to you, their respective job(s) and all related timesheet/expense/leave information.

As a Hudson client, you can login to the Client Portal by visiting the following webpage:
<https://hudsoncontractorzone.com>

Note: For an optimal user experience, using the **Google Chrome** web browser is recommended.

System Overview

Dashboard

The **Dashboard** is the home page of the system and provides access to the available functions. It is a quick way to access commonly used tasks.

Below are descriptions of the functions on the Dashboard.

Timesheets

Allows you to view/approve/reject timesheets as well as view timesheet history for the Temporary Staff and Contractor(s) assigned to you.

Expenses

Allows you to view/approve/reject expense claims as well as view expense claim history for the Temporary Staff and Contractor(s) assigned to you.

Please note that the Expense Report module must be switched on by Hudson for it to appear as a menu option on your dashboard. ***Please advise your Consultant if you require access to the Expense Report module.***

Reports

Provides you with access to a range of reports relating to Hudson Temporary Staff and Contractor(s) assigned to you.

Profile

Allows you to view and edit information relating to your own profile.

The screenshot displays the Hudson Employee Portal dashboard. At the top, there is a navigation bar with the following tabs: Dashboard, Timesheets, Leave, Reports, and Profile. Below the navigation bar, the dashboard content is organized into several sections:

- Timesheet Summary:** A section titled "Recent Timesheet Activity" with a link to "View Timesheet Summary Report >".
- News:** A section with a message: "For any queries or support in using the portal you can refer to the User Guide / FAQ Document saved in the 'Downloads' Tab" and a link to "More News >".
- Downloads:** A table listing downloaded files:

Date	File
19.8.2019	Annual Leave Forecast Calculator.xlsx
19.8.2019	2FA Set Up Guide.pdf
19.8.2019	Hudson Employee Portal - Astute user guide with FAQ.pdf
- Employees Reporting to You with Active Jobs:** A section with a table header: Employee, Workplace, Recruiter, Job Duration. Below the header, it states "Displaying 0 of 0 total employees" and includes a link to "View Allocated Employee Report >".

Getting Started

Hudson will set up your access on the system. You will automatically receive an email with your login details.

If you have not received the system login email, please contact the Hudson Customer Experience Team.

The **Customer Experience Team** are available between the hours of 7:30am & 5:30pm AEST / AEDT | 9:30am & 7:30pm NZST / NZDT via phone or email.

Phone:

Australia: 1300 137 346

New Zealand: 0800 724 376

OR

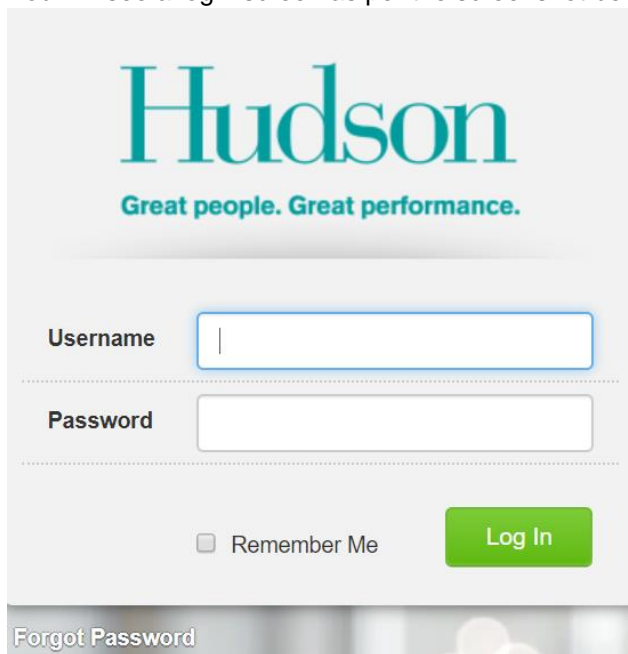
Email: payroll@hudson.com

Alternatively, you can reach out directly to your Hudson Consultant.

The new user email will provide you with your username and password. It will also direct you to the relevant link (URL) to access the Client portal.

Logging In

1. You will see a login screen as per the screenshot below.



- If you forget your Username or Password, select '**Forgot Password**'.
- You can then enter your username or email address and your details will be sent to your registered email address.

2. When logging in you may be presented with Terms & Conditions or communication updates that Hudson require you to review and accept.

3. Once logged in, you can change your password in the '**Profile Section**'. You are not able to change your username.
4. You will also be required to utilise Two-Factor Authentication (2FA). 2FA ensures that your data is secure and protected.

What is a 2FA?

Two-factor authentication (2FA) is an ATO mandated second-level authentication requirement for cloud based systems. In conjunction with a password, 2FA is an extra layer of authentication that increases security that better protects user details from unauthorised access.

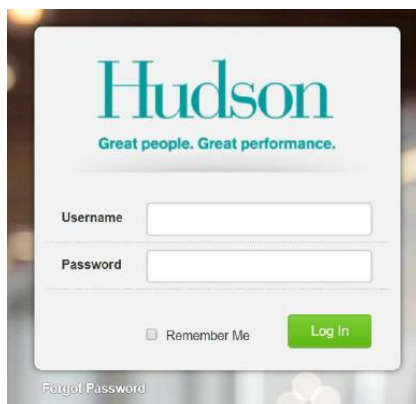
How do I set up 2FA on Astute?

There are 2 methods for generating the authentication code:
Via SMS or via a mobile app (Google Authenticator or Authy).

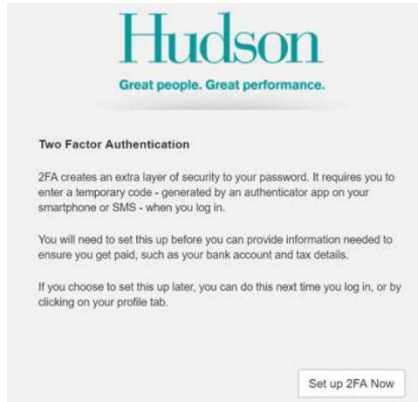
You only need to complete the 2FA set up process once. You will be prompted for 2FA whenever you access your profile.

Two Factor Authentication Instructions

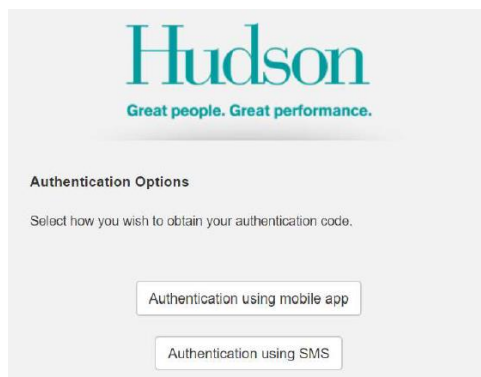
1. Log in to the Client Portal.



2. Astute will launch the set-up wizard to guide you through the process.

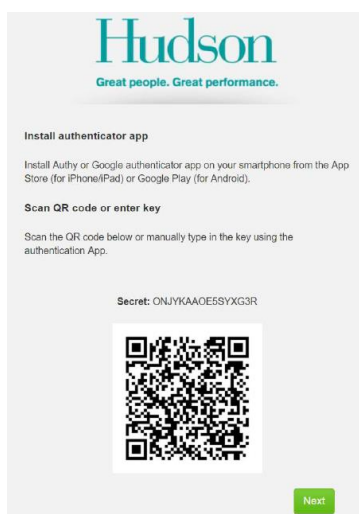


3. Select which option you would like to generate your 2FA code.



Mobile Application Authentication Steps

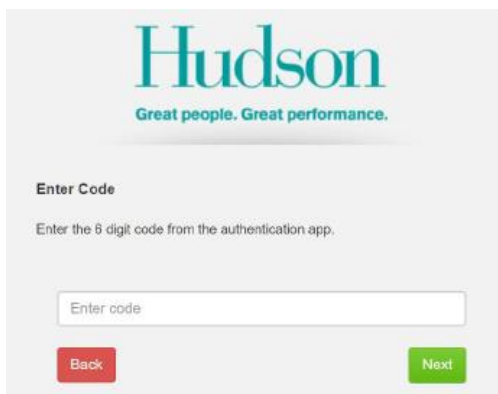
1. When 'using mobile app' is selected, you will be directed to the below screen that shows a QR code and Secret key.



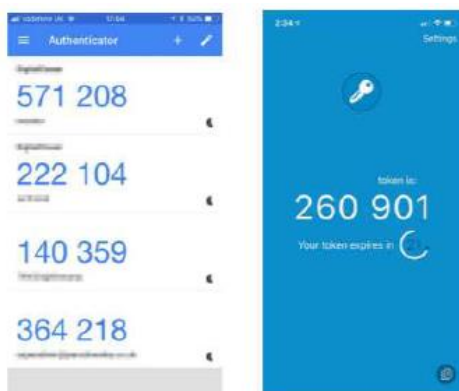
- The authentication process currently supports the Google Authenticator and Authy apps. To proceed with the setup, you will need to download one of these apps onto your smart phone or device from the App Store (Apple/iOS devices) or Google Play (for Android devices).

Once an authenticator app is installed on your device, the QR code displayed on the setup screen can be scanned directly to link the device for 2FA. Alternatively, the Secret key can be manually typed into the prompt window on your device. Click '**Next**' once the device has been linked to continue with the 2FA setup.

You will then be prompted to enter the six-digit code into Astute from the authenticator app to verify the link.



- The code in an authenticator app will regularly expire and change on a time delay basis. It is important to ensure that the code currently displaying in the app is the code being entered into Astute and is **blue** in colour. When the six-digit code is flashing and **red**, wait for the code to change to **blue** prior to entering into the '**Enter Code**' field. An invalid code will be flagged on the screen and will need to be reentered correctly to be able to continue.



- Once the authentication code is entered, click '**Next**' to move on to setting up a backup email address.

The screenshot shows the Hudson logo and tagline at the top. Below it, the heading "Register back-up email address" is followed by a sub-heading "Back-up email address" and a text box for entering the email address. A green "Next" button is located at the bottom right of the form.

5. After entering the authentication code to verify your back up email address, click '**Next**' and you will be taken to your Dashboard on the Client Portal.

The screenshot shows the Hudson logo and tagline at the top. Below it, the text "Two factor authentication set-up is now complete." is displayed. A green "Next" button is located at the bottom right of the page.

6. You can manage the details of your 2FA configuration under **Profile > Security Settings**.

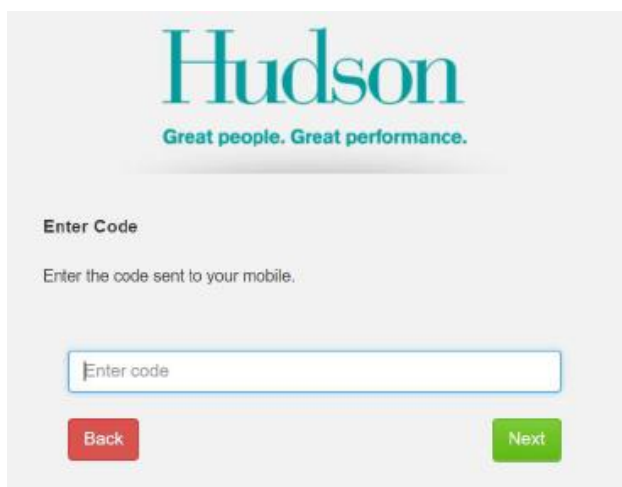
The screenshot shows the Hudson Client Portal interface. At the top, there is a navigation bar with "Dashboard", "Leave", and "Profile" options. Below the navigation bar, the "Security Settings" page is displayed. On the left, there is a sidebar menu with "Security Settings" highlighted. The main content area shows the "Password" section with a "Change your password" link and "Password Requirements" listed below. At the bottom, there is a "Two Factor Authentication" section with a "Link new device for 2FA" button and a "Register new back-up email address" button. The registered email address "patricia.ohara@hudson.com" is also visible.

Using SMS Authentication Steps

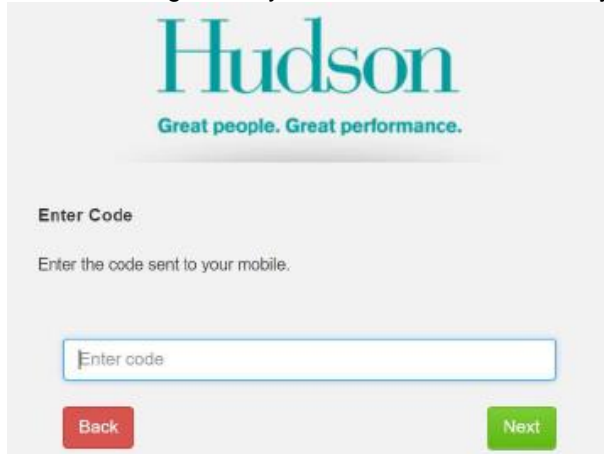
1. If the option to set up 2FA using SMS is selected, you will need to register your mobile number in the field provided then click **'Next'** to continue.

Please note, Astute will only accept Australian and New Zealand mobile numbers. International mobile numbers are not supported for the SMS option. If you do not have an Australian or New Zealand mobile number, you will need to restart the 2FA setup process and select the authenticator app method instead.

Once the mobile number is entered and validated, an SMS containing a 4-digit verification code will be sent to the mobile number you have registered.



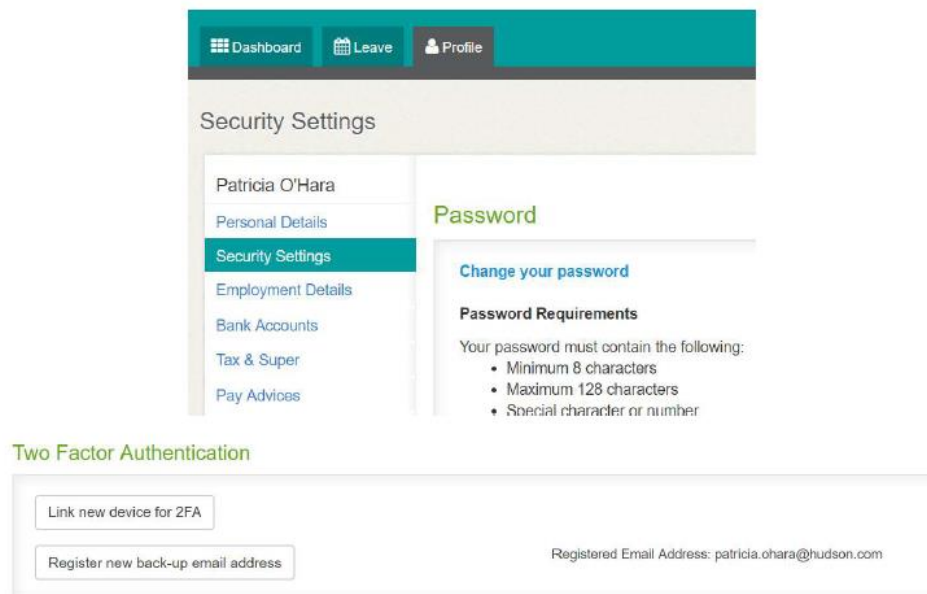
2. Enter the 4-digit code you receive via SMS to verify your number then click **'Next'**.



3. Once you have entered the code to verify your back up email address, click **'Next'** and you will be taken to your Dashboard on the Astute Portal.



You can manage the details of your 2FA configuration under **Profile > Security Settings**.



Accessing your Profile using 2FA

You will be prompted to verify yourself using 2FA when accessing the **'Profile'** tab in the portal.

- If 2FA has been set up via an app, enter the six digit code from the authentication app and click **'Authenticate'** in Astute.
- If SMS authentication is being used, activate the **'send SMS code'** action to be texted to your registered mobile number by clicking **'Here'**. Once the SMS code is received, enter the code in the verification screen and click **'Authenticate'**.

Upon successful authentication, you will be granted access to the **'Profile'** tab.

Using the Backup Email Address to Authenticate

If you are temporarily unable to access the device that you have linked for 2FA, you can use the backup email address to receive a verification code.

From the 2FA verification screen:

1. Click **Recovery Options > No access to 2FA device temporarily**. This will prompt an email notification to be delivered to the alternate (back up) email address that you entered during Step 4 above under **Mobile Application Authentication Steps**, which will contain a one-time authentication code.
2. Type the code into the **'Enter code'** field and then click **'Next'**.



Enter the one time two-factor authentication code you have received at your registered back-up email address

Remember this device for 30 days.

Next

Cannot Access Backup Email Address

If you are unable to access your back up email address or have forgotten the alternative email address, please contact the Customer Experience Team as per the **'Contact Us'** details at the end of this document. The Customer Experience Team will organise to reset your Astute system settings.

Change 2FA Option

If you wish to change the method you have selected for 2FA (SMS to mobile app or vice versa), please contact the Customer Experience Team as per the **'Contact Us'** details below.

Profile

The **Profile** Tab is the section where your personal and company details are maintained.

For ease of reference, your profile is separated into the following Tabs:

- **Personal Details:** Name, email address and phone number
- **Password:** Change your password
- **Compliance Documents:** Details of any Terms and Conditions or Policies that you have reviewed and accepted.

Approving Timesheets and Expenses

Timesheets are required to be approved on a **WEEKLY** basis. If you currently approve timesheets on a fortnightly basis, please note you that will now approve time worked on a weekly frequency.

There are two (2) ways in which a Primary Approver may approve a Timesheet or Expense.

1. Approving Timesheets & Expenses by email

When a Hudson Temporary Staff or Contractor submits a timesheet, the system will automatically send the Primary Approver an email with the timesheet and an option to review, approve or reject the timesheet within the email. If preferred, you can access the Client Portal from the URL embedded in the email notification, log into the Client Portal to review and approve or reject the timesheet or expense.

- Once you have reviewed the timesheet or expense, select **Approve** or **Reject**. A notification webpage will open for your confirmation. **Please note:** if you do not receive a notification that you have approved or rejected the timesheet or expense, then the action has not been completed. You will need to log into the Client Portal to review, approve or reject the timesheet or expense directly through the portal.
- If you reject a timesheet or expense, a web page will open requesting that you provide a reason for rejecting the timesheet or expense. It is not mandatory to provide a reason for the rejection, however this will provide the Contractor or Temporary Staff with an understanding of the reason the timesheet or expense has been rejected and permit the appropriate action to be undertaken prior to them resubmitting the timesheet or expense.

Please note the following:

If your Contractor or Temporary Staff has attached a file to their electronic timesheet (for example, a signed paper copy of the timesheet, a medical certificate or other documents), you will be required to log in to the Client Portal to review the attachment(s) and approve the timesheet.

If your Contractor or Temporary Staff are submitting expenses on timesheets (rather than separately through the expense feature), you will need to log in to review and approve the expense through the Client Portal.

2. Logging into the Portal to approve Timesheets & Expenses

This option is typically only utilised where you are approving 10 or more Timesheets or Expenses as it enables you to **'Bulk Approve'**. It is also the only way that Secondary Approvers are able to approve or reject timesheets or expenses.

Select **'Timesheets'** in the Client Portal and either:

- Tick the check box for each Timesheet OR tick the top box which selects ALL timesheets and select **'Approve Selected Timesheets'**. The reject function is not available from this screen. If using the bulk approve process, untick timesheets that require further review and approve or reject the timesheet(s) individually.

OR

- Select each Timesheet individually and click **'Reject'** or **'Approve'**

To Action **Expenses** through the portal select the **'Expenses'** tab.

- All expenses Pending Approval will appear in the **'Pending Approval'** Tab.
- To view an Expense Report, click on the expense report name. This will open the report in a pop-up screen. If you are not presented with a pop-up window, ensure that pop ups are enabled on your web browser.

- To approve or reject an Expense Report, on the '**Pending Approval**' screen select the '**Approve**' or '**Reject**' option for the relevant Expense Report.

Your Temporary Staff or Contractor(s) will be notified by email that you have approved or rejected their Timesheet or Expense Report.

A note for Secondary Approvers:

If you are listed as a Secondary Approver, you will not receive the timesheet approval email. You will receive a reminder to log into the Client Portal and approve the Timesheet or Expense Reports directly from the Client Portal.

Leave Requests – New Zealand only

All leave requests will be approved by the Hudson Payroll Team to ensure that adequate leave entitlement exists prior to payment being made to the Contractor or Temporary staff member.

If you do not wish to grant a day of leave, reject timesheets that include a leave request and provide a reason. This will enable the Contractor or Temporary staff member to consult you regarding the leave request and resubmit the timesheet(s) for the applicable date range.

Automated Email Reminders

Your assigned Temporary Staff and Contractor(s) will receive the following email reminders related to their Timesheets:

1. **First Notification Reminder:** Friday afternoon – remember to complete your Timesheet for the week. Your Timesheet needs to be submitted by 9am Monday.
2. **Final Notification Reminder:** Monday morning – remember to complete your Timesheet for the week. Your Timesheet needs to be submitted by 9am Monday.
3. If a Timesheet has not been actioned by 12.30pm Monday, the Primary Approver will receive a system generated reminder.
4. If a Primary Approver has not actioned a Timesheet by 2.00pm Monday, the Secondary Approver will receive a system generated reminder.
5. Once a Timesheet is approved, it will be ready for payroll.
6. If a Timesheet is rejected, it will be returned to the Temporary Staff or Contractor for correction and resubmission.
7. Only approved timesheets will be processed for payroll release to the Temporary Staff or Contractor(s) assigned to you.
8. Automated reminders are *not* issued for Expenses.

Reports

The 'Reports' module enables you to access reports that assist with the overall management of the Temporary Staff and Contractor(s) reporting to you.

Reports can be exported to CSV (Excel) format by clicking the '**Export to CSV**' function at the top right-hand corner of the screen.

The screenshot shows the Hudson system's navigation bar with buttons for Dashboard, Timesheets, Leave, Reports, and Profile. Below the navigation bar, the 'Allocated Employees' report is displayed. On the left, there is a menu with options: Approver Reports, Allocated Employees (selected), Record Search, and Leave Calendar. A 'Filter Results' dropdown is located next to the menu. On the right, there is an 'Export all to CSV' link. The main content area shows a table header with columns: Employee, Workplace, Recruiter, and Job Duration. Below the header, it indicates 'Total 0 Jobs'.

Allocated Employees

This report details all Hudson Employee and Contractors for whom you are either a Primary or Secondary Approver.

Search

The '**Record Search**' report enables you to view all timesheets and expenses in the system for Hudson Temporary Staff and Contractor(s) that are assigned to you (where you are either the Primary or Secondary Approver).

There are various filter options available to refine your search for specific data.

Generating Reports

1. Select '**Reports**'. A box will appear requesting a name for your required Report (for example: January 2019).
2. Select either '**Allocated Employees**' or '**Record Search**' from the menu on the left.

Allocated Employees

Approver Reports
Allocated Employees
Record Search

Filter Results

Export all to CSV

Employee	Workplace	Recruiter	Job Duration
ANDREWS, Amy	Head Office	None Assigned	4.2.2013 to 11.3.2013
ANDREWS, Amy	over there	None Assigned	4.2.2013 to 11.3.2013

Total 2 Employees

Per page 25 Items

1 of 1

Resetting your Password

If you forget your Username or Password, select '**Reset Password**'.

You can then enter your username or email address and your new password reset link will be sent to your registered email address.

If you have forgotten your username, you will be required to enter your registered email address for the username to be sent to you when prompted on the '**Forgot Password**' screen on the login landing page.

astute payroll

Reset Your Password

Please enter either your username or the email address associated with your account, and your login details will be sent to you.

If you don't know your username or associated email address, please contact your consultant for assistance.

Reset Password Cancel

Forgot Password

Contact Us:

The **Customer Experience Team** are available:

Between the hours of 7:30am & 5:30pm AEST / AEDT | 9:30am & 7:30pm NZST / NZDT via phone or email.

Phone:

Australia: 1300 137 346

New Zealand: 0800 729 376

Email: payroll@hudson.com

Alternatively, reach out directly to your Consultant.

Frequently Asked Questions

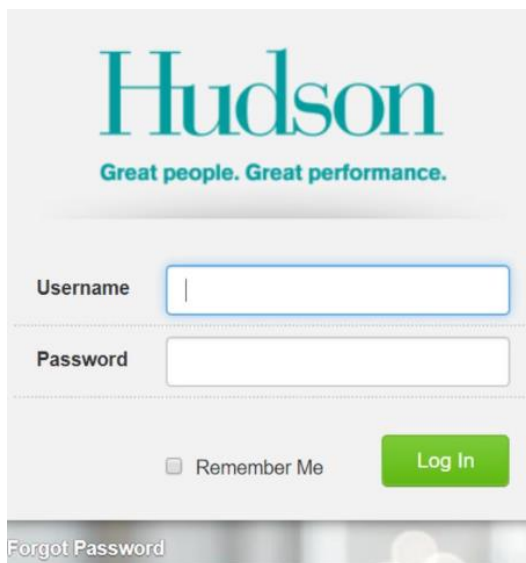
How will I receive my login details?

Hudson will set up your access on the system. You will automatically receive an email with your login details.

If you have not received the system login email, please contact the Customer Experience Team as per the details below in the '**Contact Us**' section.

Logging In

You will see a login screen as per the screenshot below.



- If you forget your Username or Password, select '**Forgot Password**'.
- You can then enter your username or email address and your details will be sent to your registered email address.

When logging in you may be presented with Terms & Conditions or communication updates that Hudson require you to review and accept.

Once logged in, you can change your password in the '**Profile Section**'. You are not able to change your username.

You will also be required to utilise 2FA (two-factor authentication) security. 2FA ensures that your data is secure and protected.

What is a 2FA?

A two-factor authentication (2FA) is an ATO mandated second-level authentication on cloud based systems. Along with a password it's an extra layer of authentication that increases security that better protects user details from unauthorised access.

How do I set up 2FA on Astute?

There are 2 methods for generating the authentication code:
Via SMS **or** via a mobile app (Google Authenticator or Authy).

Please refer to the **Client User Guide contained within this document on Page: 6** for step-by-step instructions.

How do I reset my password?

If you forget your Username or Password, select '**Forgot Password**' on the login screen.

You can then enter your username or email address and your new password reset link will be sent to your registered email address.

Will all my information migrate to the new Client Portal?

Yes, all key information will be migrated and validated. It is recommended that you take some time to navigate through the new system and review your details in case there are any changes required.

How do I approve a timesheet?

For single timesheets, an auto generated email notification will be delivered to your system registered email address. To review, approve or reject a timesheet, either select the '**Approve**' or '**Reject**' buttons within the email **OR** click on the '**log in to your portal**' link which will take you directly to the Client Portal and display the list of submitted timesheet(s) awaiting review and authorisation. Refer to the screenshot below. All timesheets require **WEEKLY** approval.

To approve multiple timesheets in bulk, you will need to log into the Client Portal via the link provided in the notification email and tick ALL or only select INDIVIDUAL timesheets to be approved. *Please note:* you may only approve timesheets in bulk. Rejection of timesheets needs to occur on a per record basis from the Client Portal.



You may also [log in to your portal](#) to approve this record and/or view other information.

Will I still have access to the previous Client Portal?

No, the new Astute platform supercedes access to the previous Client Portal. All existing client information will be migrated to the *new* Client Portal.

What happens if I am a Timesheet Approver and I am going away?

Astute can only assign 1 Timesheet Approver. If an alternative Manager or Supervisor is assigned to authorise timesheets, email a request to the Customer Experience Team to temporarily change the Approver name and email address.

Contact Us:

The Hudson Customer Experience Team are available to support you with any questions or concerns you may have.

The **Customer Experience Team** are available between the hours of 7:30am & 5:30pm AEST / AEDT | 9:30am & 7:30pm NZST / NZDT via phone or email.

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