

Operation manual

Employee self-service (ESS)

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Logging into ESS



1. Open the Google Chrome web browser.
2. Type the following into the Address Bar, then hit Enter.
<https://ess.federation.edu.au>



3. The following login screen will be displayed:

The image shows the EmpowerHR login screen. It features the EmpowerHR logo at the top, which consists of three stylized human figures in green, red, and blue. Below the logo are four input fields: "User Name", "Password", "UNI" (with a dropdown arrow), and "Domain". A "Login" button is located below these fields. A small blue question mark icon is in the bottom right corner of the login area.

4. Login details will be as follows:

Username and password

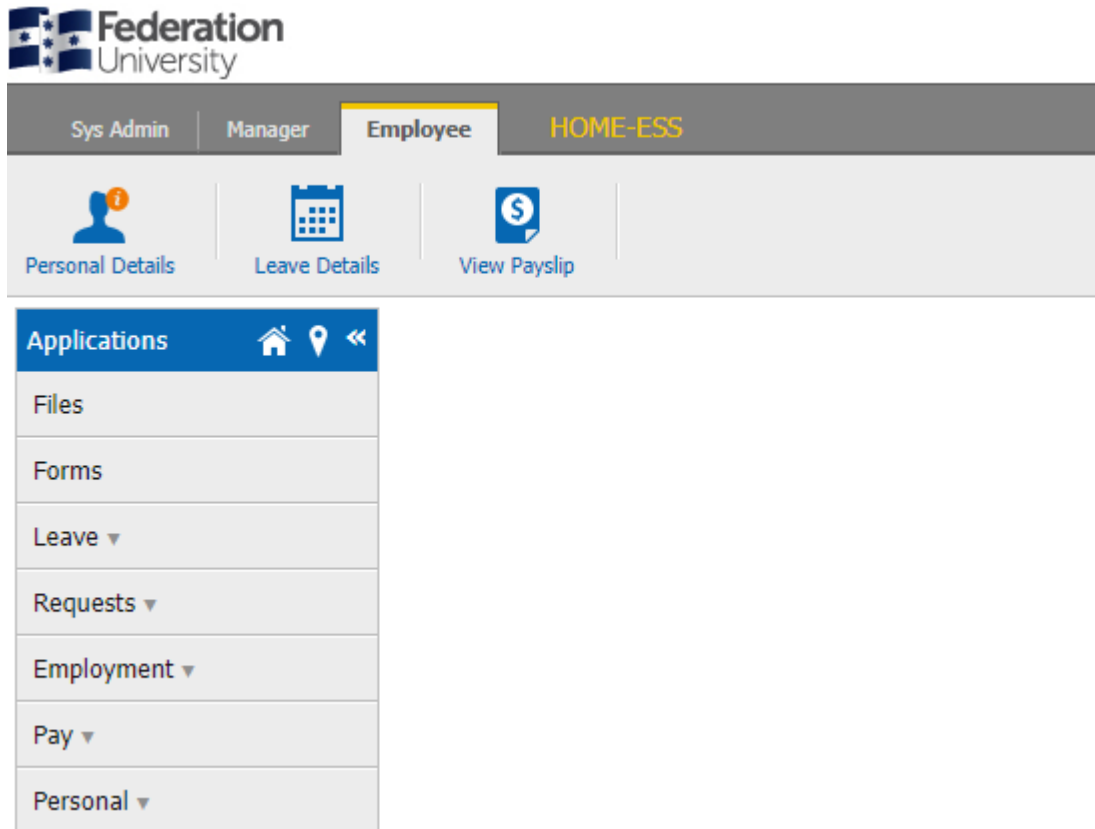
Your ESS login credentials are the same as your Federation network login credentials. (the same username and password you use to login to the Federation network, email etc.)

If you are unsure what your username or password is or require a password reset please use the [password portal](#) or contact the ITS ServiceDesk by submitting a request at <http://servicedesk.federation.edu.au> (phone 5327 9999).

Please note that you cannot change your password via ESS.

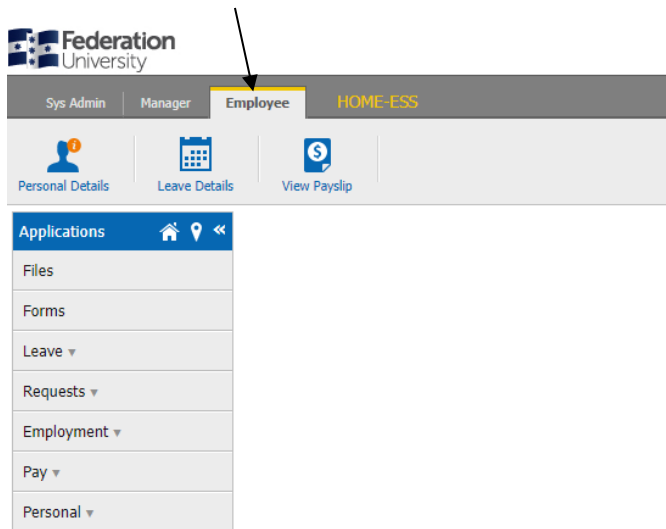
Click the 'Sign On' button after entering your login credentials

5. If logon was successful the following screen will be displayed.



Changing personal details on ESS

1. Click on the 'Employee' Tab as seen below:



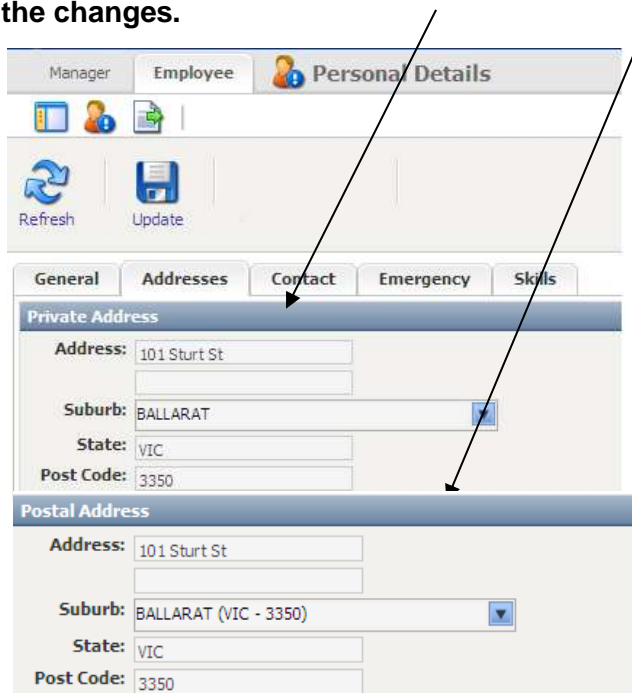
2. Then select the 'Personal Details' button



3. Now you will see a row of new tabs which will allow you to make any necessary changes to your personal details then update them on the system. Available tabs are 'General', 'Addresses', 'Contact', Emergency etc.

For example, by clicking on the 'Addresses' tab, you will be able to change your Private and Postal Address details.

When you have amended any data, you must click on the 'Update' button to save the changes.



You are able to change your contact details by clicking on the 'Contact' tab. After amending the data in the fields provided, click on the 'Update' button.

The screenshot shows a web interface for updating contact details. At the top, there are tabs for 'Manager', 'Employee', and 'Personal Details'. Below these are icons for 'Refresh' and 'Update'. The 'Contact' tab is selected, showing fields for 'Business' and 'Personal' phone numbers, 'Business' and 'Personal' fax numbers, 'Business' and 'Personal' mobile numbers, and 'Business' and 'Personal' email addresses. The 'Business' email field is populated with 'j.smith@federation.edu.au'. A red box highlights the 'Update' button, and an arrow points from the text above to it. Another arrow points from the text below to the 'Business' email field.

It is important to have the business email field populated with your federation staff email address to ensure email notifications can be sent to you when requesting leave via ESS.

Please also ensure all above phone/mobile details are correct as the University may need to contact you in the event of an emergency, for example, a code red 'catastrophic' fire day announcement.

The 'Emergency' tab allows you to enter emergency contacts or 'next of kin' details in the ESS system. It is very important that these fields are kept up-to-date in the event of an injury or other emergency while at work.

ESS allows up to two Emergency contacts to be entered.

Manager Employee **Personal Details**

Refresh Update

General Addresses Contact **Emergency** Skills

Emergency Contact

Name:

Relationship:

Address:

Post Code:

Country:

Phone

Personal:

Business:

Mobile

Personal:

Emergency Contact #2

Name:

Relationship:

Address:

Post Code:

Country:

Phone #2

Personal:

Business:

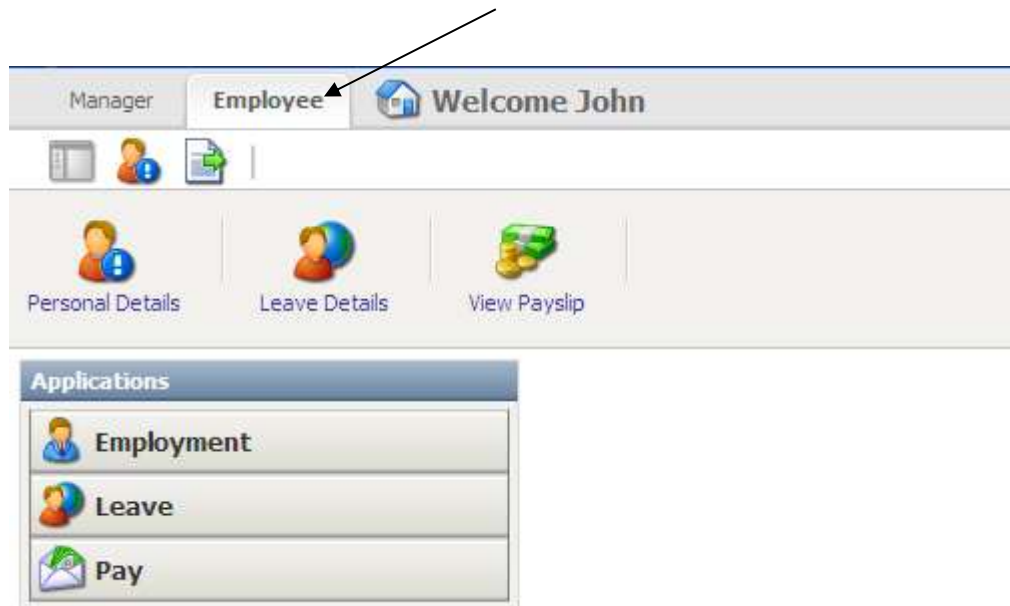
Mobile #2

Personal:

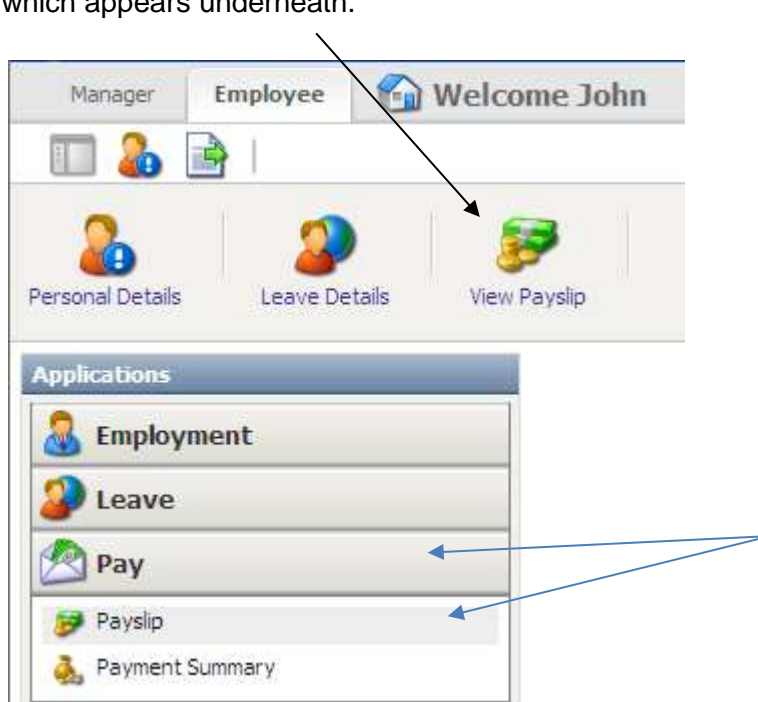
Viewing payslips

ESS allows the user to easily access their payslips. Not only can you access your current payslip, you can also access older payslips from previous pay days.

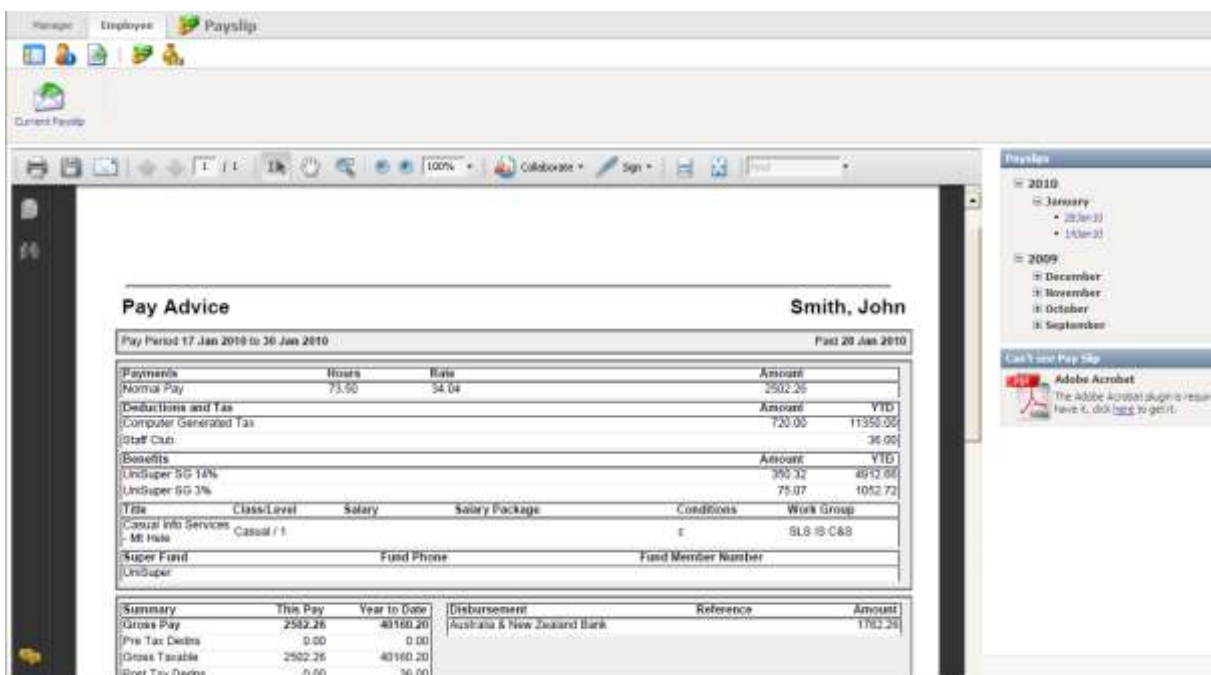
1. To access your payslip, click on the 'Employee' tab as seen below:



2. Either select 'View Payslip' OR select the 'Pay' button, then the 'Payslip' button which appears underneath.



3. By default your latest (current) payslip will appear on screen. (see below)



4. You will notice there are several options available to you on the toolbar which can be located above the payment summary **OR** if you hover the mouse over the actual payment summary.

NB: the toolbar's position/look will depend on the version of Acrobat Reader you have installed on your computer

Adobe Acrobat

If you have either of these versions of Adobe Acrobat installed you will need to move the mouse cursor over the bottom of the payslip for the toolbar to appear (it may not automatically appear until you do this)



From left to right of the toolbar, you have the ability to save a copy of the payment summary in pdf format, print the payment summary, cycle through the other pages (if any), and zoom in and out of the document using the – and + buttons.

4. The following appears to the right of the payslip window.

This is where you can view past payslips by clicking on the year, month and pay date.



If you do not see a payslip appearing at all on screen it may be because you don't have The Adobe Acrobat browser plugin installed.

If necessary, click on the link provided to install it.

Viewing employment history

1. ESS is also very useful for displaying employment history for staff within the University.

To access your employment history at Federation, select the Employee tab, then the Employment button, then select 'Employee History'



2. The following screen will appear which displays all positions held within Federation, including salary classifications, pay increases, pay rates, increment changes, reasons for changes and start and end dates.

This information is split into two sections 'Salary History' and 'Position History'. This data cannot be changed by the user.

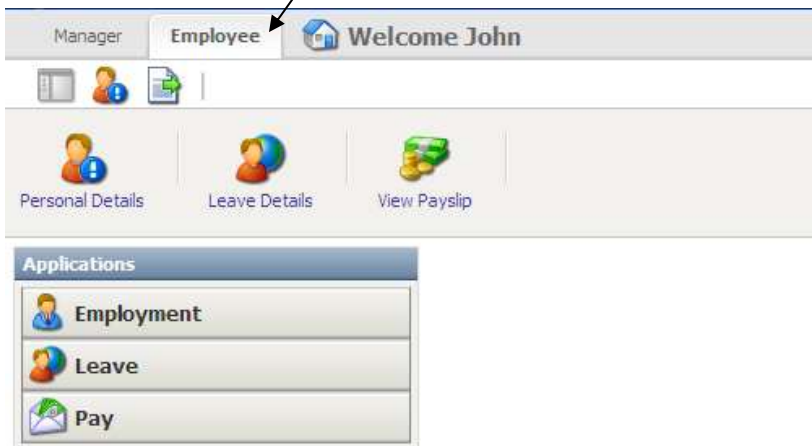
Salary History								
From	Up To	Position	Reason	Package	Salary	Rate	Class	LV
04 Jan 2009		Casual Info Services - HS (HS00)	Relocate		.00	.00	Casual	1
15 Apr 2007	03 Jan 2009		None		.00	.00	Casual	1
27 Feb 2006	14 Apr 2007	Casual Info Services - HS (HS00)	New Start		.00	.00	Casual	1
03 Jan 2010			Award Chg		45262.00	34.04	HEW	2
01 Oct 2009	02 Jan 2010		Transfer		52771.00	32.75	HEW	2
05 Jul 2009	30 Sep 2009		Award Chg		50021.00	36.08	HEW	3
11 Jun 2009	04 Jul 2009		Salary Inc		49046.00	29.57	HEW	3
01 Jun 2009	10 Jun 2009		Transfer		46077.00	23.07	HEW	2
17 Mar 2009	21 May 2009		CompExpDel		40324.00	31.46	HEW	1
04 Jan 2009	26 Mar 2009		Award Chg		40324.00	31.46	HEW	1
01 Jan 2009	03 Jan 2009		Conditions		32577.00	20.95	HEW	1

Position History						
From	Up To	Position	Reason	Cost Centre	Class	Temp
04 Jan 2009		Casual Info Services - HS (HS00)	Relocate		Casual	ft
15 Apr 2007	03 Jan 2009	Casual Info Services - HS (HS00)	None	Info Tech Serv - Admin Cas	Casual	ft
27 Feb 2006	14 Apr 2007	Casual Info Services - HS (HS00)	New Start	Info Tech Serv - Admin Cas	Casual	ft
03 Jan 2010			Award Chg		HEW	ft
01 Oct 2009	02 Jan 2010		Transfer		HEW	ft
05 Jul 2009	30 Sep 2009		Award Chg		HEW	ft
11 Jun 2009	04 Jul 2009		Salary Inc		HEW	ft
01 Jun 2009	10 Jun 2009		Transfer		HEW	ft
17 Mar 2009	21 May 2009		CompExpDel		HEW	ft
04 Jan 2009	26 Mar 2009		Award Chg		HEW	ft

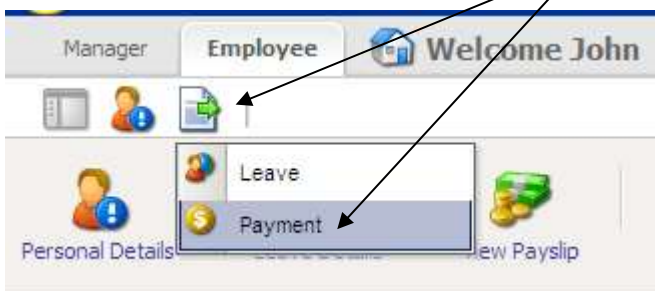
Changing payment instructions (changing bank payment details)

1. ESS users also have the ability to change their banking details.

To do this select the Employee tab.



2. Now hover the mouse cursor over the New Request button, then click on the 'Payment' button.



3. The following screen will appear, listing your current payment instructions.




4. Select the 'Change Instructions' button to amend or add new payment instructions. (ESS allows you to add more than 1 payment instruction. For example, your pay can be distributed to more than 1 bank account)

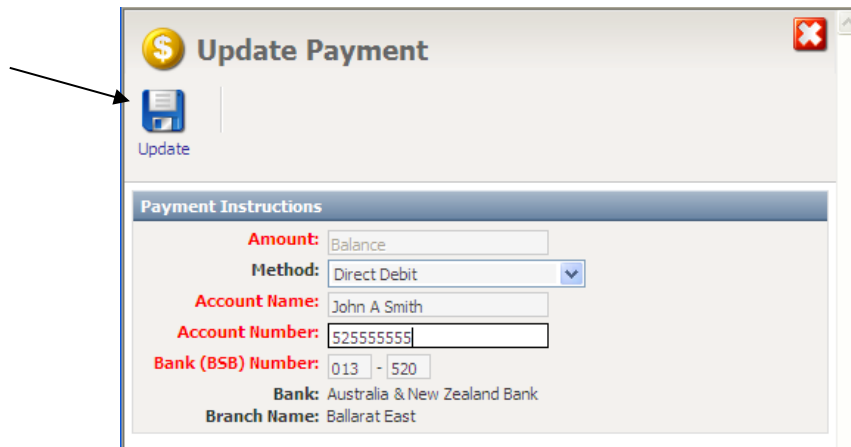


- You will be presented with the following screen.

Please note that by default the 'Not Submitted' and the 'Current Instructions' are the same payment instruction. The 'Not Submitted' instruction appears so you are able to change your payment details without having to delete all details then start all over again.



- To change/amend your current payment instruction please click on the 'Change'  on located on the 'Not Submitted' record.
- The following screen will appear. Please ensure all details are correct and that every field has been entered. Once completed, click on the 'Update' button.

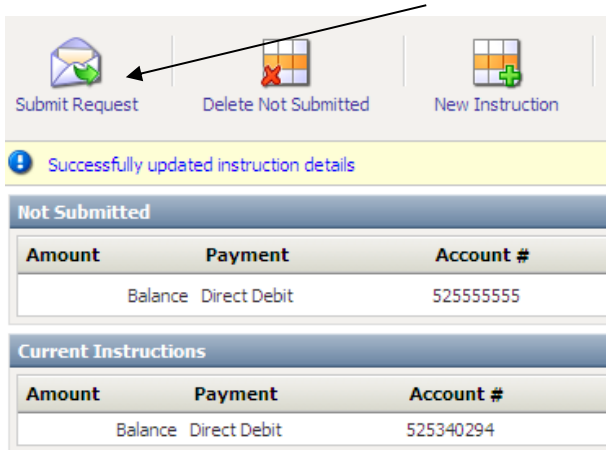


- Now a message 'Successfully updated instruction details' will appear on screen and you will also notice that for the 'Not Submitted' record, your new payment instruction will be visible.

Please note that your new payment instruction still has not changed on the system. There are two more steps you will need to complete before the changes you made will come into effect.



9. You must now click on the 'Submit Request' button.



10. Use the 'Send To' button on the screen below, for your new bank details to be sent to Payroll for approval.

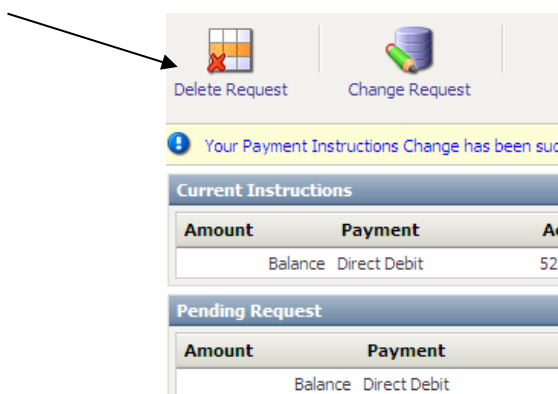
Once the Payroll team approve/confirm your new payment instructions, these new details come into effect. You will receive a confirmation email when this occurs.



11. You will notice that the 'Not Submitted' record will now read as a 'Pending Request' until the new payment instructions are approved by payroll.



12. Prior to approval by payroll, if you no longer want the pending request to be approved/processed, select the 'Delete Request' button



13. Select the 'Confirm' button to confirm that you want to delete the request.
You can also type in a comment on the 'Comments' field explaining why you no longer want the changes to go ahead (this is optional).

Confirm Delete Payment Instruction Request

Confirm

Amount	Payment	Account #	Acc' Name	Bank	Branch	BSB
Balance	Direct Debit	525555555	John A Smith	Australia & New Zealand Bank	Ballarat East	013-520

Delete Comments

Comments:

14. Another feature you may find useful is the ability to add more payment instructions and specify how much of your wage goes into a specific bank account.

To do this, select the 'New Instruction' button

Manager Employee **Payment**

Submit Request Delete Not Submitted **New Instruction**

15. The following details are required including the amount you would like to be distributed from your pay into the specified account.

After you have entered your details, click on the 'Save' button.

Add Payment

Save

Payment Instructions

Amount:

Method:

Account Name:

Account Number:

Bank (BSB) Number: -

Bank: Australia & New Zealand Bank

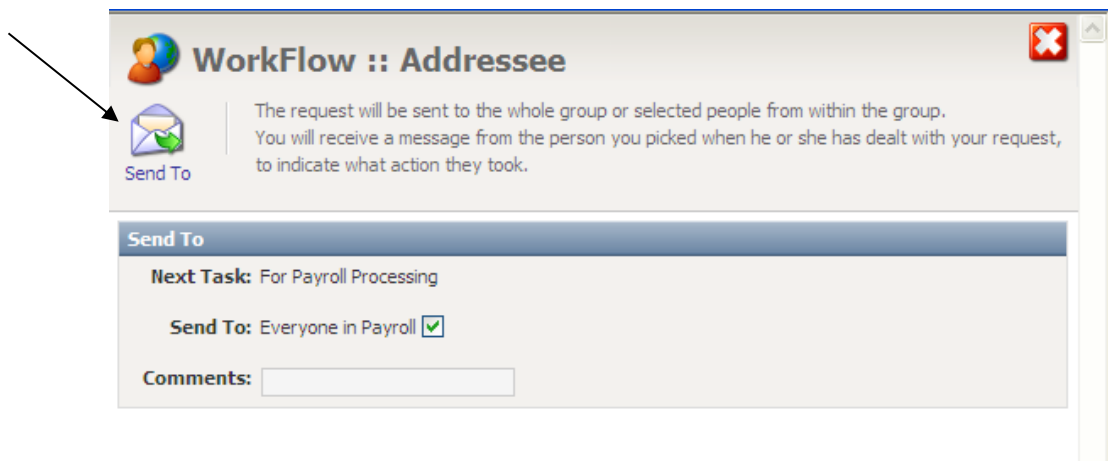
Branch Name: Ballarat East

16. Then select the 'Submit Request' button.



17. Select the 'Send To' button for your new bank instructions to be sent to Payroll for approval.

Once the Payroll team approve/confirm the new payment instructions, the new details will come into effect and a confirmation email will be sent to you.



Leave bookings

One of the major components built into ESS is the ability to book leave and access leave balances.

Staff are able to make leave bookings for annual leave, carer's leave, compassionate leave, cultural leave, partner leave, personal leave (e.g. sick leave), special leave (TAFE teachers) and federation business/travel.

- All other types of leave (leave without pay, maternity leave, WorkCover and long service leave) are all unavailable in self-service. Please continue using the existing paper-based forms for these types of leave.

In the example below an annual leave booking will be demonstrated.

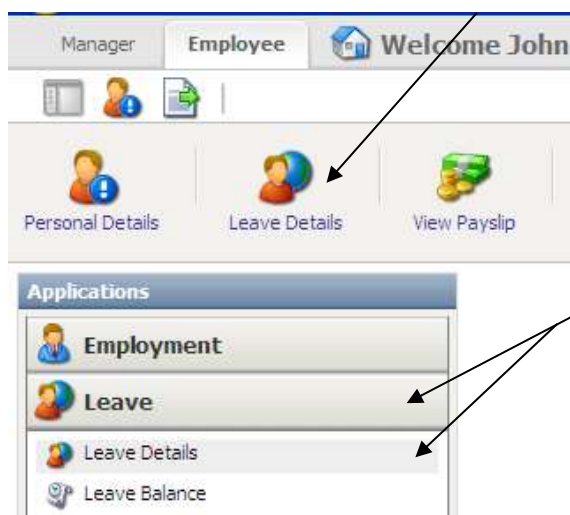
Please note that all types of leave are booked in the same way apart from selecting the different 'type' of leave from the drop-down menu.

Booking annual leave – example

1. To make an annual leave booking select the 'Employee' tab.



2. Now select either the larger 'Leave Details' button or click on the 'Leave' button followed by the smaller 'Leave Details' button



- The following screen will appear displaying the current leave balances/entitlements, any current leave bookings you have, and any bookings still awaiting approval.

Leave Type	Position	Hours	Days
Annual Leave (73.50)		118.31	
Sick Leave (73.5) <2 yr.Rule		293.86	
Paid LSL 73.5 PH			0.00

- You will also notice a window displaying all of your leave history which you are able to filter by using the check-boxes. For example, you may only want to display all Sick Leave you have taken.

Leave Type	Position	Leave Reason	Start	End	Amount	Units
Annual Leave (73.50)		None	05 Nov 2009	05 Nov 2009	7.35	hours
Annual Leave (73.50)		None	04 Sep 2009	04 Sep 2009	7.35	hours
Sick Leave (73.5) <2 yr.Rule		None	12 Aug 2009	13 Aug 2009	14.70	hours
Sick Leave (73.5) <2 yr.Rule		None	10 Jun 2009	11 Jun 2009	14.70	hours
Annual Leave (73.50)		None	09 Jun 2009	09 Jun 2009	7.35	hours
UB Business/Travel 73.5		None	01 Jun 2009	04 Jun 2009	29.40	hours
Annual Leave (73.50)		None	24 Apr 2009	24 Apr 2009	7.35	hours
Annual Leave (73.50)		None	23 Apr 2009	23 Apr 2009	2.00	hours
Annual Leave (73.50)		None	07 Apr 2009	15 Apr 2009	29.40	hours
Annual Leave (73.50)		None	27 Mar 2009	27 Mar 2009	7.35	hours
Annual Leave (73.50)		None	16 Mar 2009	16 Mar 2009	7.35	hours
Annual Leave (73.50)		None	27 Feb 2009	27 Feb 2009	1.50	hours

- In the above example (#3), the general/professional employee has sufficient annual leave (118.31 hrs) to make a booking.

They would be able to book up to a maximum of 16 days (118.31 hrs ÷ 7.35 hrs = 16 days) annual leave (provided their supervisor approves it).

To book leave, select the 'New Request' button.

- The following screen will be displayed.

Create New Leave Request

Required fields are marked in red.

Save

Leave Request

Position: Team Leader

Leave Type: Annual Leave (73.50)

Start Date: 24 Feb 2010

End Date: 24 Feb 2010

Calculated Amnt: 7.35 Hours

Explanation:

- The staff member must first select their appropriate position. I.e. they may have more than one position within the University; a full-time continuing position, and also a casual position. As casuals are not entitled to annual leave, the full-time continuing position needs to be selected.

Click on the 'Position' drop-down menu and select the appropriate position.

Create New Leave Request

Required fields are marked in red.

Save

Leave Request

Position: Casual Info Services - Mt Helen SLS - IS - Casu...

Leave Type: Casual Info Services - Mt Helen SLS - IS - Casual &...

Start Date: 23 Feb 2010

End Date: 23 Feb 2010

Calculated Amnt: 7.35 Hours

- Select the 'Leave Type' drop-down menu arrow, then choose the desired leave type for this booking (e.g. in this case, annual leave).

CREATE NEW LEAVE REQUEST

Required fields are marked in red.

Save Attachments

Leave Request

*** Start Date:** 20 Jun 2022

*** End Date:** 20 Jun 2022

Leave Type: Annual Leave (73.50)

Calculated Amnt (Hrs): Annual Leave (73.50)

Actual Amount (Hrs):

(Please enter Hours above):

Explanation:

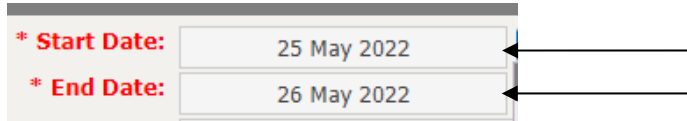
Carer's Leave
Compassionate Leave
Cultural Leave
Isolation Leave - Medical
Miscellaneous Leave
Partner Leave
Personal Leave 73.5 2 yr.Rule
Special Leave (TAFE Teachers)
Fed Uni Business/Travel
Exchange Leave Loading

A reminder that all other types of leave (leave without pay, maternity leave, WorkCover and long service leave) are all unavailable in self-service. Please continue using the existing paper-based forms for these types of leave.

9. Now select the date(s) you would like to make your booking.

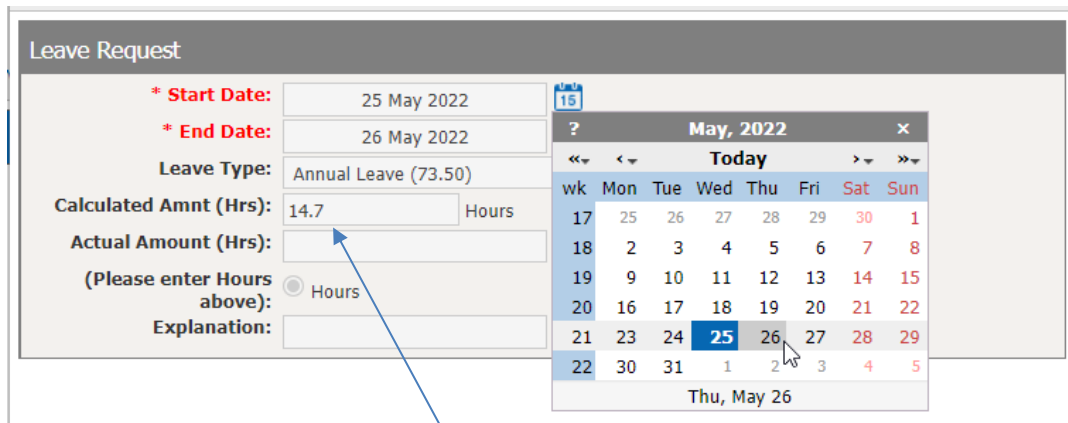
To do this select the calendar icon to the right of the Start Date and End Date fields, then choose the required day from the calendar.

(This must be done for both the start date and end date fields)



* Start Date: 25 May 2022
* End Date: 26 May 2022

In this example, to make a booking for 25 and 26 May, simply select '25' as the Start Date, and '26' for the End Date.



Leave Request

* Start Date: 25 May 2022
* End Date: 26 May 2022
Leave Type: Annual Leave (73.50)
Calculated Amnt (Hrs): 14.7 Hours
Actual Amount (Hrs):
(Please enter Hours above): Hours
Explanation:

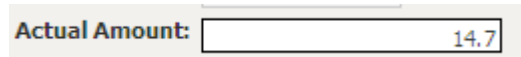
wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
17	25	26	27	28	29	30	1
18	2	3	4	5	6	7	8
19	9	10	11	12	13	14	15
20	16	17	18	19	20	21	22
21	23	24	25	26	27	28	29
22	30	31	1	2	3	4	5

Thu, May 26

You will notice that the 'Calculated Amnt (Hrs)' field is automatically populated.

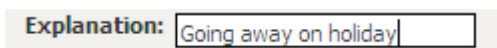
In this case, a full-time, general/professional staff member has booked two days (or 14.7 hrs) i.e. 7.35 hrs/day x 2 days = 14.7 hrs

10. The 'Actual Amount' field is populated by the user, and is used to confirm that the 'Calculated Amount' is correct. Please enter the same value as the 'Calculated Amount' (this number should only be less for one-day bookings, and only where a full day is not being used).



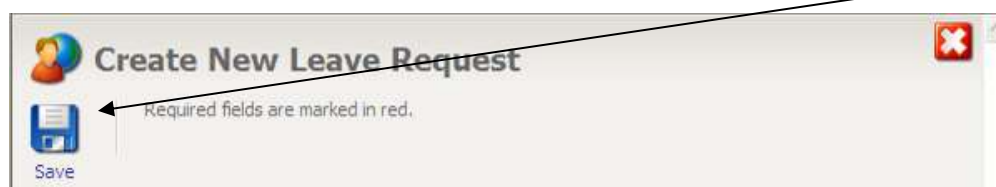
Actual Amount: 14.7

11. The 'Explanation' field is an optional field for staff that wish to give more detail to why they are booking the leave.



Explanation: Going away on holiday

12. After you have completed filling out the leave request form select the 'Save' button



Create New Leave Request

Required fields are marked in red.

Save

13. The next step in the leave booking process is for you to send the leave request to your supervisor/manager for approval. Please select the supervisor/manager you directly report to from the drop-down menu.

If your supervisor is on leave, you can send it to another supervisor/manager within your area who has the authority to approve your leave request. You may also want to add a comment in the 'Comments' field if you need your supervisor to know something further about the request.

Finalise by selecting the 'Send To' button. An email will be sent to your supervisor/manager alerting them that you have submitted a leave request for action.

WorkFlow :: Addressee

Send To

Pick the right person to send the request to.
You will receive a message from the person you picked when he or she has dealt with your request, to indicate what action they took.

Send To

Next Task: For Supervisor / Mgr Approval

Send To: [Dropdown Menu]

Comments: [Text Input]

14. Should another screen appear after you have clicked on the 'Send To' button, it will be asking if you would like to book any further leave for any other positions you may hold (which position you are using the leave for).

In the below example, the employee holds a casual position also, therefore the 'Not Required' button should be selected.

In most cases, the 'Not Required' button can be selected.

Create New Leave Request

Save Not Required

Required fields are marked in red.

Your Leave Request has been successfully submitted.

Leave Request for Casual Info Services - Mt Helen

Leave Type: Compassionate Leave 73.5

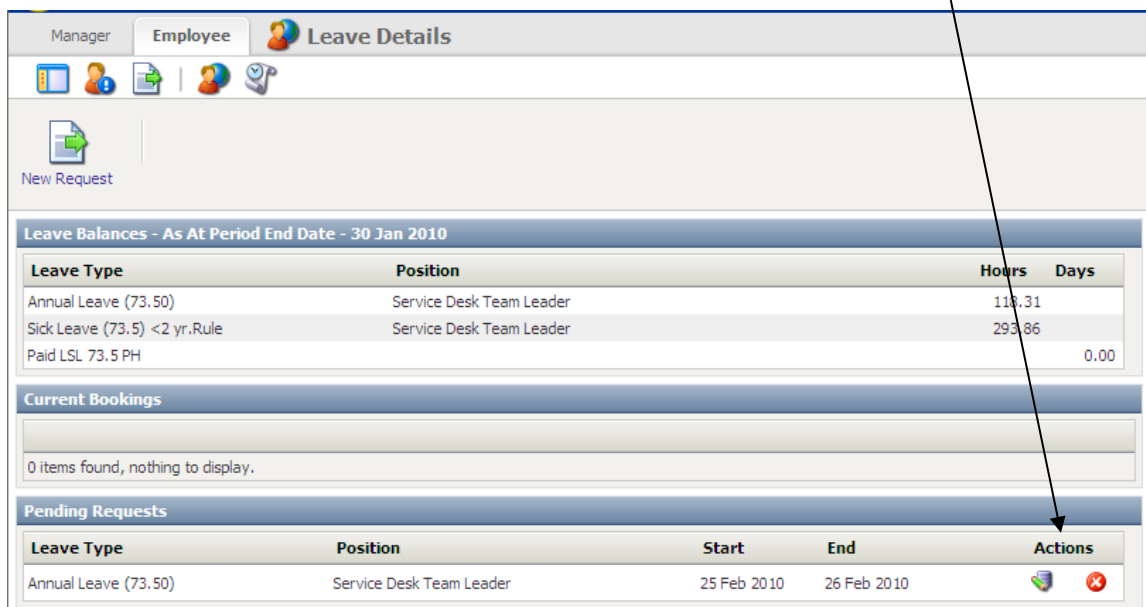
Start Date: 25 Feb 2010

End Date: 26 Feb 2010

Calculated Amnt: 14.7 Hours



15. You will see any leave requested appearing under the 'Pending Requests' heading.

If you have made an error, you can either delete your request (by selecting the red and white 'cross' button), or you can amend it (by selecting the pencil 'Change' button).

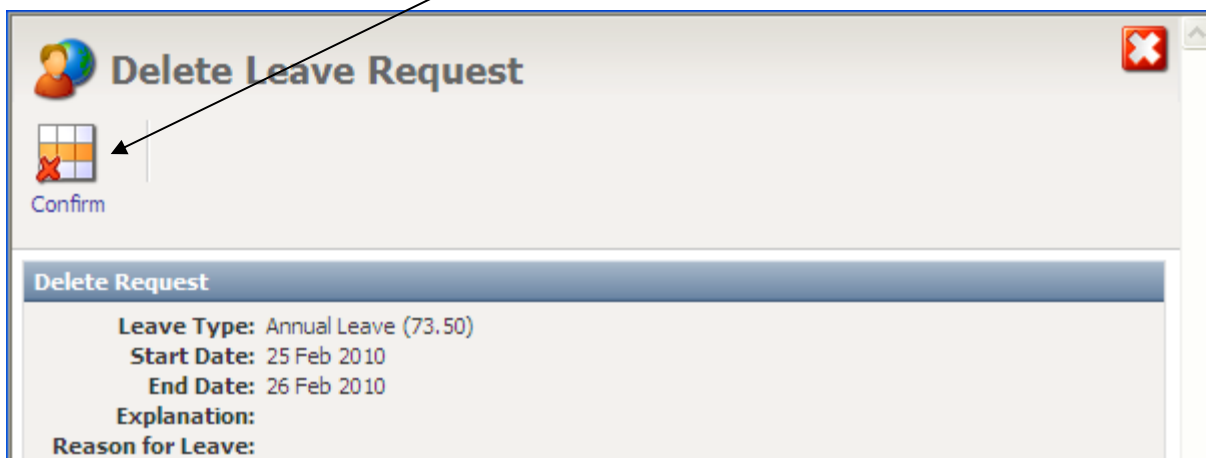


The screenshot shows the 'Leave Details' page for an employee. It includes a 'New Request' button, a table of leave balances as of 30 Jan 2010, and a table of pending requests. An arrow points from the 'Change' button in the pending requests table to the 'Change' button in the 'Delete Leave Request' dialog.

Leave Type	Position	Hours	Days
Annual Leave (73.50)	Service Desk Team Leader	118.31	
Sick Leave (73.5) <2 yr.Rule	Service Desk Team Leader	293.86	
Paid LSL 73.5 PH			0.00

Leave Type	Position	Start	End	Actions
Annual Leave (73.50)	Service Desk Team Leader	25 Feb 2010	26 Feb 2010	 

16. You will then need to select the 'Confirm' button to delete a leave request.



The screenshot shows the 'Delete Leave Request' dialog box. It features a 'Confirm' button with a red 'X' icon. Below the button, the details of the request to be deleted are shown: Annual Leave (73.50), Start Date: 25 Feb 2010, End Date: 26 Feb 2010, and Reason for Leave.

Delete Request

Leave Type: Annual Leave (73.50)
Start Date: 25 Feb 2010
End Date: 26 Feb 2010
Explanation:
Reason for Leave:

17. When you amend/change a current leave request the following screen appears. After making changes, you must select the 'Update' button.



The screenshot shows the 'Change Leave Request' dialog box. It features an 'Update' button with a floppy disk icon. Below the button, the details of the request to be updated are shown: Annual Leave (73.50), Start Date: 25 Feb 2010, End Date: 01 Mar 2010, and Calculated Amnt: 22.05 Hours. The 'End Date' field is marked with a red border, indicating it is a required field.

Change Leave Request

Required fields are marked in red.

Update

Leave Request

Leave Type: Annual Leave (73.50)
Start Date: 25 Feb 2010
End Date: 01 Mar 2010
Calculated Amnt: 22.05 Hours

18. Please note, if you make a change to your leave request, you will need to send it again to your supervisor/manager for approval.

e.g. choose your supervisor from the drop-down list, then select the 'Send To' button.

WorkFlow :: Addressee

Pick the right person to send the request to.
You will receive a message from the person you picked when he or she has dealt with your request, to indicate what action they took.

Send To

Next Task: For Supervisor / Mgr Approval

Send To: [Dropdown Menu]

Comments: [Text Box]

19. Now if you go back to the Home Page in ESS (click on the 'Employee' tab), you will notice a new window appearing to the right of screen that confirms pending leave requests (and specifying the type of leave, the dates requested and the progress of your request.)

This identifies the status/progress of the request, i.e. whether it is with your supervisor/manager or payroll for approval.

Operator Message
System Message

Pending Requests

Leave Request

Annual Leave (73.50): 25 Feb 2010 - 01 Mar 2010
Currently With: Pending, Approved

Select the blue 'Leave Request' hyperlink, to return to the main 'Leave Details' screen.

20. Following supervisor/manager approval, you will receive an email to your University staff email address.

The email will look like the example below:

To:

Subject: Leave Request

Your leave request, for Annual Leave (73.50), from 10 Nov 2009 to 10 Nov 2009, has been accepted and passed on.


This means that your supervisor/manager has approved the leave booking to go ahead, and your request has been forwarded to Payroll for final confirmation. If required, you can select the link included in the email to be directed to the ESS login screen.

21. Finally, following checking/confirmation by Payroll, your booking will be officially added to the system, and you will receive another email to your University staff email address confirming your leave has been approved.



22. Future bookings will appear under the 'Current Bookings' heading.

There is no further action required and your leave request is complete.

Current Bookings					
Leave Type	Position	Start	End	Actions	
Annual Leave (73.50)		25 Feb 2010	01 Mar 2010		

Uploading attachments to a leave request - personal leave example

Self-service users now have the ability to **attach documents** to a new leave request.

This is particularly useful for personal leave bookings. You can now attach a scanned, electronic copy of a medical certificate to your leave booking, and you, your supervisor/manager and Payroll, will be able to view the document.

As employees are still required to specify if they have a medical certificate, and Payroll are required to sight it before actioning a request: by attaching a certificate to the request, this eliminates the need for Payroll to match emailed or hard copy certificates to requests before processing.

1. To make a personal leave booking click on the 'Employee' tab.



2. Then select either the larger 'Leave Details' button or the 'Leave' button followed by the smaller 'Leave Details' button



- The following screen will appear displaying the current leave balances/entitlements, any current leave bookings you have, and any bookings still awaiting approval.

The screenshot shows the 'Leave Details' page for an employee. At the top, there are tabs for 'Manager' and 'Employee', and a 'Leave Details' header. Below the header are several icons, including a 'New Request' button. The main content area is divided into three sections: 'Leave Balances - As At Period End Date - 30 Jan 2010', 'Current Bookings', and 'Pending Requests'. The 'Leave Balances' section contains a table with the following data:

Leave Type	Position	Hours	Days
Annual Leave (73.50)		118.31	
Sick Leave (73.5) <2 yr.Rule		293.86	
Paid LSL 73.5 PH			0.00

The 'Current Bookings' and 'Pending Requests' sections both display '0 items found, nothing to display.'

- Click on the 'New Request' button.

This screenshot is identical to the previous one, but with a black arrow pointing from the top-left towards the 'New Request' button, which is located below the 'Leave Balances' table.

- Then select Personal Leave from the 'Leave Type' dropdown menu.

The screenshot shows the 'CREATE NEW LEAVE REQUEST' form. At the top, there are 'Save' and 'Attachments' buttons. The form fields include:

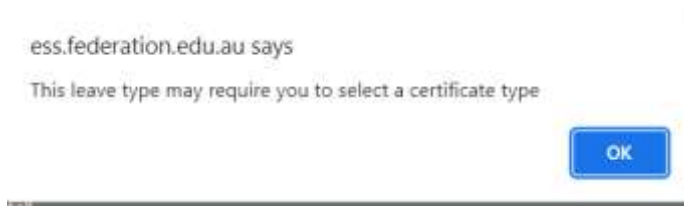
- * Start Date: 20 Jun 2022
- * End Date: 20 Jun 2022
- Leave Type: Annual Leave (73.50) (with a dropdown arrow)
- Calculated Amnt (Hrs): Annual Leave (73.50)
- Actual Amount (Hrs): (Please enter Hours above):
- Explanation:

 The 'Leave Type' dropdown menu is open, showing a list of options:

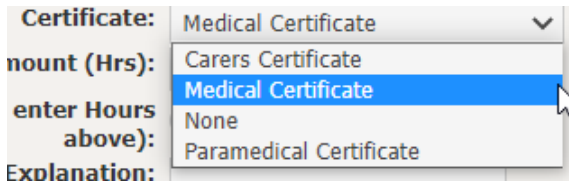
- Annual Leave (73.50)
- Career's Leave
- Compassionate Leave
- Cultural Leave
- Isolation Leave - Medical
- Miscellaneous Leave
- Partner Leave
- Personal Leave (73.5 2 yr.Rule) (highlighted in blue)
- Special Leave (TAFE Teachers)
- Paid Uni Business/Travel
- Exchange Leave Loading

 A black arrow points from the top-left towards the 'Personal Leave' option in the dropdown menu.

- Once Personal Leave is selected, a warning message will appear explaining that you may require a certificate type before submitting the request. Click the OK button.



Then choose the certificate being added (or select none, if applicable)

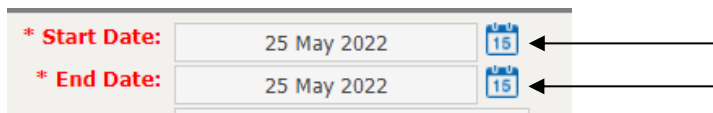


It is very important that the Certificate type is selected as this identifies whether the approvers need to look for an attachment for this specific request. In this example the user has selected 'Medical Certificate' as the Certificate type.

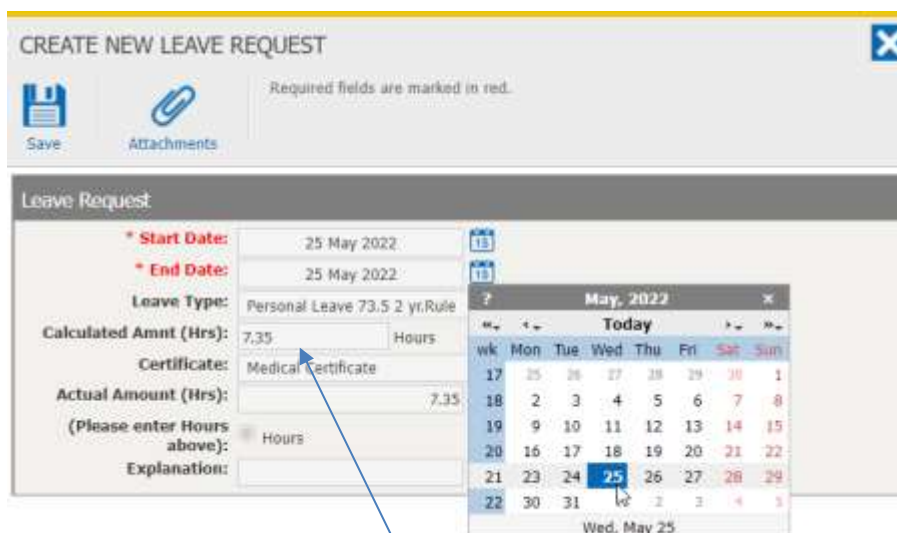
- Now select the date(s) you would like to make your booking.

To do this select the calendar icon to the right of the Start Date and End Date fields, then choose the required day from the calendar.

(This must be done for both the start date and end date fields)



In this example, to make a one-day booking for 25 May, simply select '25' as the Start Date, and '25' for the End Date.



You will notice that the 'Calculated Amnt (Hrs)' field is automatically populated.

In this case, a full-time, general/professional staff member has booked one days (or 7.35 hrs)

8. The 'Actual Amount' field is populated by the user, and is used to confirm that the 'Calculated Amount' is correct. Please enter the same value as the 'Calculated Amount' (this number should only be less for one-day bookings, and only where a full day is not being used).

Calculated Amnt (Hrs):	7.35	Hours
Actual Amount (Hrs):		7.35

9. The 'Explanation' field is an optional field for staff that wish to give more detail to why they are booking the leave.

Explanation:

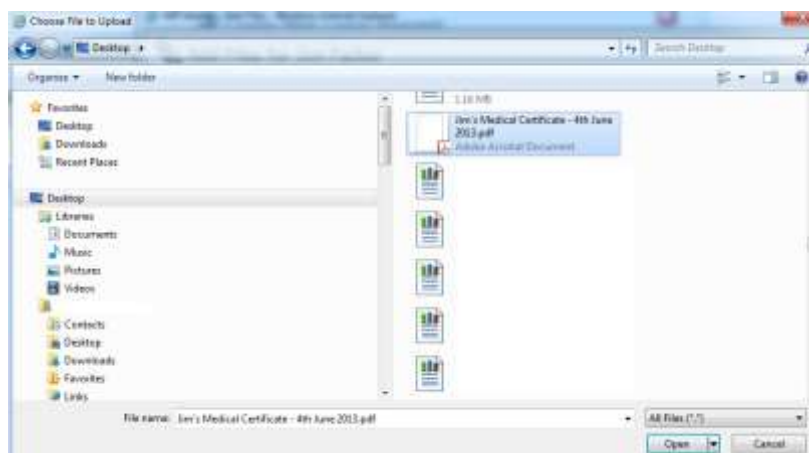
10. Now the user has entered all of the details for the personal leave request, all they must do is attach a copy of the certificate. To add an attachment click on the blue paperclip button with the heading 'Attachments'.



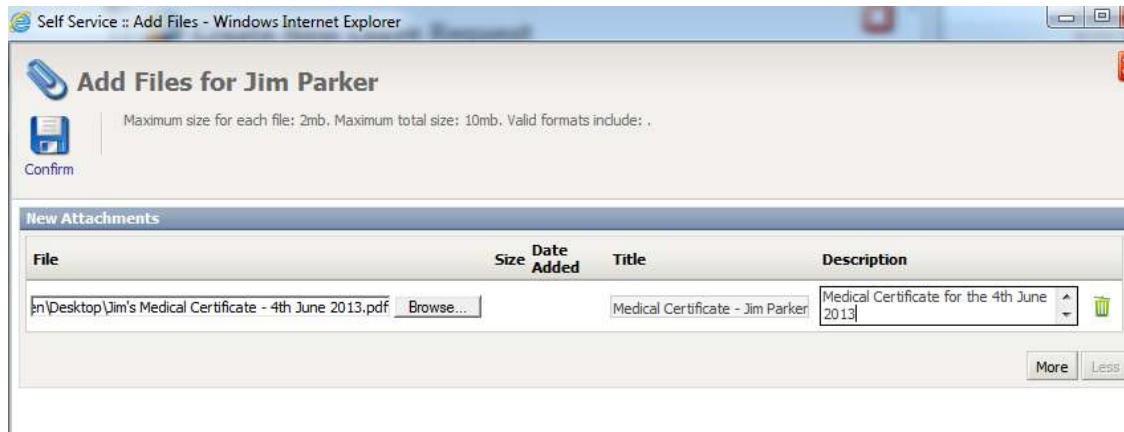
11. The following screen will now appear. To attach the medical certificate click on the 'Browse' button to navigate through your drives, files and folders.



12. Select the appropriate file for upload by double-clicking on it or by selecting the file and clicking the 'Open' button.



13. After selecting the file for upload you must also type in a 'Title' and 'Description' for the attachment. This should be something meaningful so that you will be able to find and review the file at a later time.



14. Selecting the 'Confirm' button will attach the file to your booking.



15. To check the file is correctly attached to the booking, select the Attachments button to see the attachment, along with the title and description you entered. To add additional files (if required) select the 'Browse' button again.



16. After the booking details have been completed and the file is attached select the 'Save' button.



Self Service :: New Request - Windows Internet Explorer

Create New Leave Request

Required fields are marked in red.

Save **Attachments**

Leave Request

Leave Type: Sick Leave (73.5) <2 yr.Rule

*** Start Date:** 04 Jun 2013

*** End Date:** 04 Jun 2013

Calculated Amnt: 7.35 Hours

Certificate: Medical Certificate

Actual Amount: 7.35

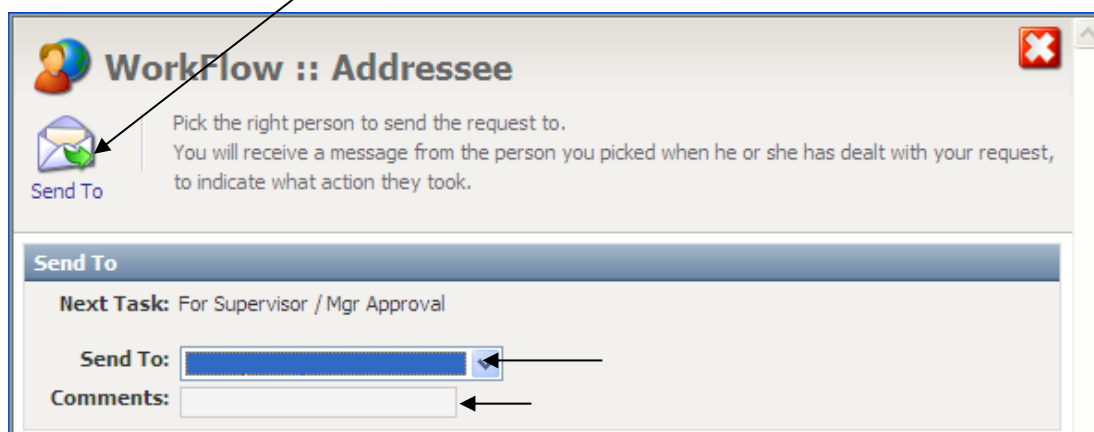
Hours or Days: Hours

Explanation:

17. The final step in the leave booking process is for you to send the leave request to your supervisor/manager for approval. Please select the supervisor/manager you report directly to from the drop-down menu.

If your supervisor is on leave you can send it to another supervisor/manager within your area who has the authority to approve your leave request. You may also want to add a small comment in the 'Comments' field if you need your supervisor to know something further about the request.

Finalise by selecting the 'Send To' button. An email will be sent to your supervisor/manager alerting them that you have submitted a leave request for action



Workflow :: Addressee

Pick the right person to send the request to.
You will receive a message from the person you picked when he or she has dealt with your request, to indicate what action they took.

Send To

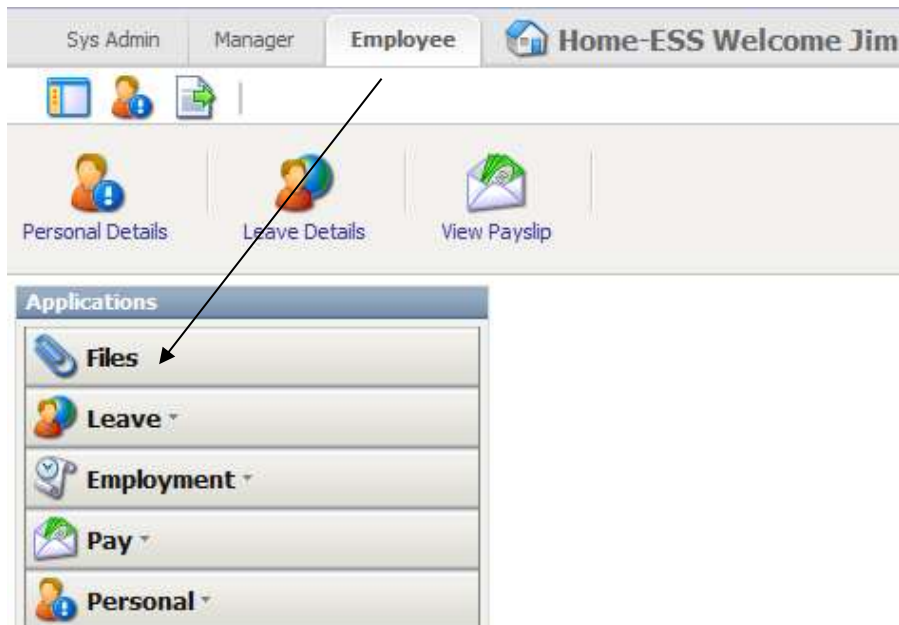
Next Task: For Supervisor / Mgr Approval

Send To: [Dropdown Menu]

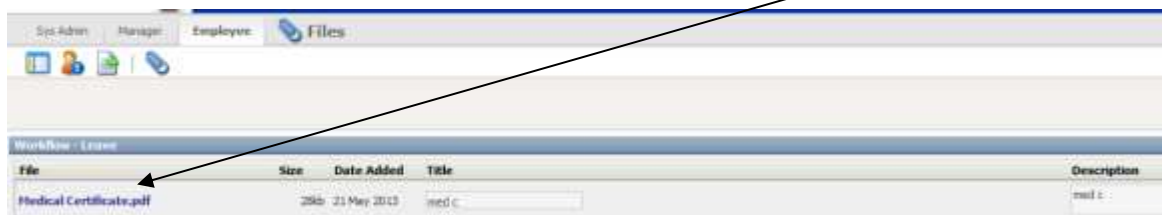
Comments: [Text Area]

Retrieving files previously attached to leave bookings

1. The 'Files' button appearing on the Home page of self-service allows users to retrieve files that have attached to past leave bookings.



2. You can open all historical attachments by simply selecting the blue file name(s) hyperlink listed on the following screen



Viewing leave balances for future dates

1. If you wanting to know what your leave balance will be at a specific date, you can find out by selecting the Employee Tab, then the 'Leave' button, then selecting the 'Leave Balance' button.



- The following screen will display

Leave Type	Amount	Units
Annual Leave (73.50)	118.31	hours
Sick Leave (73.5) <2 yr.Rule	293.86	hours
Paid LSL 73.5 PH	.00	days

- For the system to calculate future leave entitlements you can select the calendar icon to the right of the 'Balance Date' field and specify a date.

After selecting a date, click on the 'Calculate' button (you can also choose whether to include LSL balances by using the 'Include LSL' check-box)

- The Leave balances will be shown as at the specified date you selected, e.g. 30 June 2010

Leave Type	Amount	Units
Annual Leave (73.50) for Service Desk Team Leader	178.68	hours
Sick Leave (73.5) <2 yr.Rule for Service Desk Team Leader	293.86	hours

Operation manual

Manager self-service (MSS)

Prepared by

Andrew Christensen

Senior HR Systems Administrator

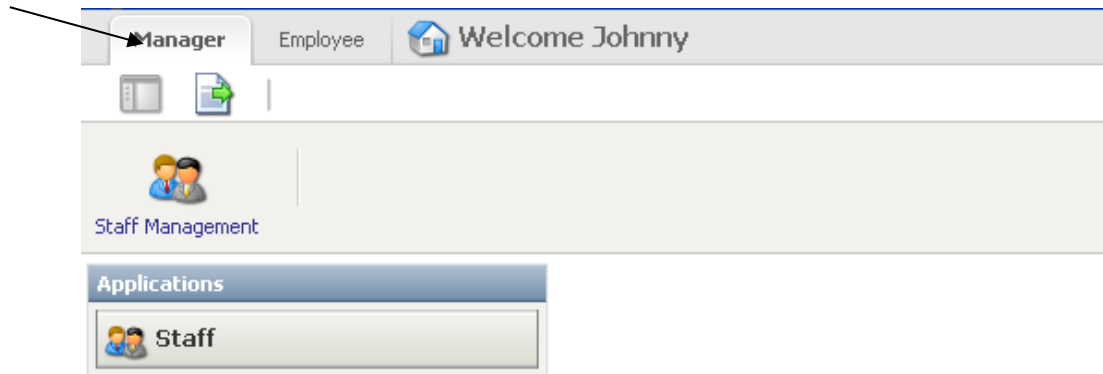
Status: Final | Version: 7.2 | Date: 20 June 2022

The 'Manager self-service (MSS)' component enables supervisors/managers to approve/reject leave requests for their staff, view individual future leave bookings, access a 'Leave Absence Chart' displaying all leave days, and run leave balance enquiries for all team members.

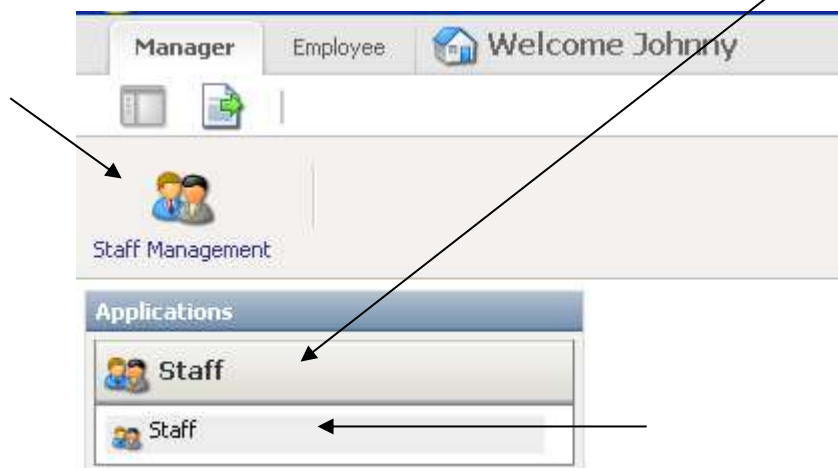
Accessing MSS, searching for staff using filters and accessing individual staff information

1. Supervisors/managers will see an extra tab at the top of the screen called 'Manager'. This is the MSS component of the self-service system.

Simply click on this tab to view available options.



2. Then select the larger 'Staff Management' button OR the 'Staff' button under the 'Applications' heading, then the Staff Button underneath.



3. The following screen will appear. This is where the supervisor/manager can select the desired team members for review.



You can select staff you would like to view information about by using the 'Search Filter'.

After each search it is important to click on the 'Reset Search' button, otherwise there will be conflicting filters and you may find that not all staff members are selected.



Searching staff by name

For example, John Smith who is the manager and logged into MSS wants to find out leave balances for just one of his staff members, James Parker. John can begin typing in 'Parker' into the 'Name:' field and James' record will appear automatically.

The screenshot shows the MSS Staff Lookup interface. At the top, there are tabs for "Manager", "Employee", and "Staff". Below these are icons for "Reset Search", "Leave Balances", and "Absence Chart". The main area is a table titled "Staff Lookup" with columns: Name, Email, Position, Temporary, Section, and Location. One record is visible: Parker, James D, a.christensen@ballarat.edu.au, Co-ordinator, HRMIS, No, Human Resources, MTH. To the right, the "Search Filter" panel is open, showing "Name: Parker", "Lists:" (dropdown), "Position:" (list with "Co-ordinator, HRMIS" selected), "Section:" (list with "Human Resources" selected), and "Location:" (list with "MTH" selected). An arrow points from the "Reset Search" icon to the "Name:" field in the Search Filter.

Searching staff by position

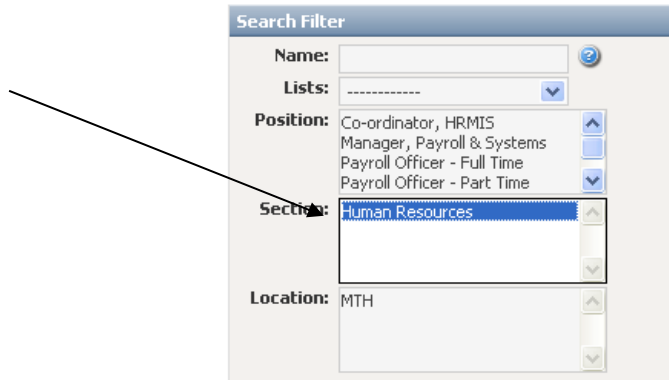
If you would like to select staff members by their position title you can simply click on the desired position title from the 'Position' list. If you would like to select multiple staff by position title hold down the 'Shift' key on the keyboard then click once on the desired positions.

The screenshot shows the MSS Staff Lookup interface. At the top, there are tabs for "Manager", "Employee", and "Staff". Below these are icons for "Reset Search", "Leave Balances", and "Absence Chart". The main area is a table titled "Staff Lookup" with columns: Name, Email, Position, Temporary, Section, and Location. Five records are visible: Johnson, Sarah V, Murphy, Cathy, Parker, James D, Peterson, Anne J, and Smith, John. To the right, the "Search Filter" panel is open, showing "Name:" (empty), "Lists:" (dropdown), "Position:" (list with "Co-ordinator, HRMIS", "Manager, Payroll & Systems", "Payroll Officer - Full Time", and "Payroll Officer - Part Time" selected), "Section:" (list with "Human Resources" selected), and "Location:" (list with "MTH" selected). An arrow points from the text "Hold down the shift key to select and deselect staff positions" to the "Position:" list.

Hold down the shift key to select and deselect staff positions

Searching staff by section

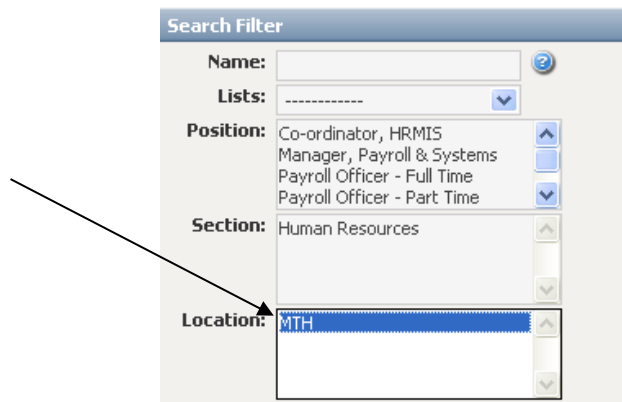
If the supervisor/manager has staff reporting to them from more than one section, they can select the Section of their choosing (in this example there is only one section to choose from)



The screenshot shows a 'Search Filter' dialog box with the following fields: 'Name' (text input), 'Lists' (dropdown), 'Position' (list with 'Co-ordinator, HRMIS', 'Manager, Payroll & Systems', 'Payroll Officer - Full Time', and 'Payroll Officer - Part Time'), 'Section' (dropdown with 'Human Resources' selected), and 'Location' (dropdown with 'MTH' selected). An arrow points to the 'Section' dropdown.

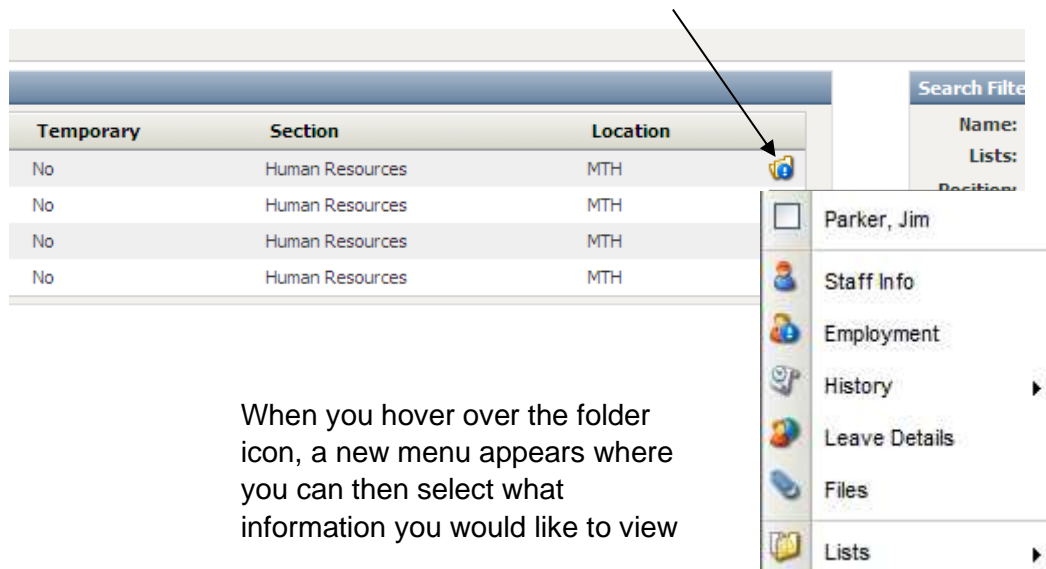
Searching staff by location

Staff can also be filtered by campus location. In this example, there is only one campus to choose from, Mt Helen



The screenshot shows the same 'Search Filter' dialog box as above, but with the 'Location' dropdown selected and 'MTH' highlighted. An arrow points to the 'Location' dropdown.

- Once you have selected the desired staff, you can now lookup individual staff information, e.g. employment details, employee history, view leave and booking attachments (uploaded files). To do this hover the mouse cursor over the folder icon with a blue exclamation mark which appears to the right of employee records selected earlier.



The screenshot shows a table with columns 'Temporary', 'Section', and 'Location'. All rows have 'No' in the 'Temporary' column, 'Human Resources' in the 'Section' column, and 'MTH' in the 'Location' column. A folder icon with a blue exclamation mark is visible to the right of the first row. A context menu is open over this icon, listing options: 'Parker, Jim', 'Staff Info', 'Employment', 'History', 'Leave Details', 'Files', and 'Lists'. An arrow points to the folder icon.

Temporary	Section	Location
No	Human Resources	MTH
No	Human Resources	MTH
No	Human Resources	MTH
No	Human Resources	MTH

When you hover over the folder icon a new menu appears where you can then select what information you would like to view

Staff information

The Staff Information Screen will display Personal Information for the employee, and includes their address, telephone/mobile/work contact numbers, work email address and emergency contact information.

Cathy Murphy	
Personal	Emergency Contact
Name: Cathy Murphy Gender: Female Address: Court VIC, 3351 Phone: 53 069 Mobile: 04 868 Email: com.au	Name: John Relationship: Spouse Phone: 03 534 Business: 03 533 Mobile: 04276
Work	Emergency Contact#2
Phone: 5327 Mobile: Email: @ballarat.edu.au Fax: 5327	Name: Relationship: None Phone: Business: Mobile:

Employment

The 'Employment' screen will display the current employment information such as commencement dates, pay information, position number, location, cost centre code, 'reports to' relationship and other useful information.

Employment for Cathy Murphy	
Information as at 29 Feb 2008	
Status: Currently Employed Service Began: 04 Jun 2007 Commenced Agency: 13 Jun 2008 Date Permanent: 04 Jun 2007	
Payroll Officer - Part Time	Pay
Effective: 06 Jan 2008 Reports To: Manager, Payroll & Systems Organisation: CS Location: MTH Cost Centre: SSO 1138 130000 Class/Level: HEW Next Increment: 04 Jun 2008 Type: Permanent Conditions: Part Time Redeployee?: Base Hours: 36.75 FTE: 50.00% Position No: 00366	Salary: \$ Allowances: \$0.00 HDA: \$0.00 Total: \$ Pay Basis: Hourly Pay by exception: y

History > Employee History

Supervisors/managers are able to view staff salary and position history on this screen. You can identify salary increments, position start and end dates, hourly rates, classifications and also classification levels.

Salary History								
From	Up To	Position	Reason	Package	Salary	Rate	Class	LV
31 Jan 2010		Casual - HR - Mt Helen	Relocate		.00	.00	Casual	1
04 Jan 2009	30 Jan 2010	Casual - HR - Mt Helen	Relocate		.00	.00	Casual	1
13 Jun 2008	03 Jan 2009	Casual - HR - Mt Helen	New Start		.00	.00	Casual	1
03 Jun 2008	03 Jun 2008	Payroll Officer - Part Time	Pay Detail			21.63	HEW	
06 Jan 2008	02 Jun 2008	Payroll Officer - Part Time	Award Chg			21.63	HEW	
04 Jun 2007	05 Jan 2008	Payroll Officer - Part Time	None			20.70	HEW	
31 Jan 2010		Payroll Officer - Part Time	Relocate			24.96	HEW	
03 Jan 2010	30 Jan 2010	Payroll Officer - Part Time	Award Chg			24.96	HEW	
08 Sep 2009	02 Jan 2010	Payroll Officer - Part Time	ContExpDat			24.00	HEW	
05 Jul 2009	07 Sep 2009	Payroll Officer - Part Time	Award Chg			23.53	HEW	
04 Jan 2009	04 Jul 2009	Payroll Officer - Part Time	Award Chg			23.07	HEW	
28 Sep 2008	03 Jan 2009	Payroll Officer - Part Time	Award Chg			22.40	HEW	
08 Sep 2008	27 Sep 2008	Payroll Officer - Part Time	New Employ			22.06	HEW	

Position History						
From	Up To	Position	Reason	Cost Centre	Class	Temp
31 Jan 2010		Casual - HR - Mt Helen	Relocate		Casual	n
04 Jan 2009	30 Jan 2010	Casual - HR - Mt Helen	Relocate		Casual	n
13 Jun 2008	03 Jan 2009	Casual - HR - Mt Helen	New Start		Casual	n
03 Jun 2008	03 Jun 2008	Payroll Officer - Part Time	Pay Detail		HEW	n

Leave Details

This screen displays all leave balances for the employee in question, any current leave bookings and pending requests (requests that need to be rejected/approved). This screen also displays a historical list of all types of leave taken.

Leave Balances - As At Period End Date - 27 Feb 2010				
Leave Type	Position	Hours	Days	
Annual Leave (73.50)	Payroll Officer - Part Time	38.44	2.61	
Sick Leave (73.5) <2 yr.Rule	Payroll Officer - Part Time	69.41	4.72	
Paid LSL 73.5 PH			0.00	

Current Bookings	
0 items found, nothing to display.	

Pending Requests	
0 items found, nothing to display.	

Leave History from 20 Jun 2007						
Options: <input checked="" type="checkbox"/> Annual Leave <input checked="" type="checkbox"/> Sick Leave <input checked="" type="checkbox"/> Long Service Leave <input checked="" type="checkbox"/> Other Leave						
Leave Type	Position	Leave Reason	Start	End	Amount	Units
Personal Leave 73.5	Payroll Officer - Part Time	None	05 Feb 2010	05 Feb 2010	7.35	hours
Annual Leave (73.50)	Payroll Officer - Part Time	None	24 Dec 2009	24 Dec 2009	3.68	hours
Sick Leave (73.5) <2 yr.Rule	Payroll Officer - Part Time	None	08 Oct 2009	08 Oct 2009	3.68	hours
Sick Leave (73.5) <2 yr.Rule	Payroll Officer - Part Time	None	06 Oct 2009	06 Oct 2009	3.35	hours
Annual Leave (73.50)	Payroll Officer - Part Time	None	15 Sep 2009	29 Sep 2009	44.1	hours
Sick Leave (73.5) <2 yr.Rule	Payroll Officer - Part Time	None	14 Jul 2009	14 Jul 2009	5.1	hours
Sick Leave (73.5) <2 yr.Rule	Payroll Officer - Part Time	None	10 Jul 2009	10 Jul 2009	7.35	hours
Sick Leave (73.5) <2 yr.Rule	Payroll Officer - Part Time	None	12 May 2009	12 May 2009	7.35	hours
Annual Leave (73.50)	Payroll Officer - Part Time	None	07 Apr 2009	17 Apr 2009	22.05	hours
Personal Leave 73.5	Payroll Officer - Part Time	None	20 Mar 2009	20 Mar 2009	2.5	hours
Compassionate Leave 73.5	Payroll Officer - Part Time	None	18 Dec 2008	19 Dec 2008	11.03	hours
Sick Leave (73.5) <2 yr.Rule	Payroll Officer - Part Time	None	18 Nov 2008	18 Nov 2008	7.35	hours
Sick Leave (73.5) <2 yr.Rule	Payroll Officer - Part Time	None	04 Nov 2008	04 Nov 2008	1.5	hours

Leave booking attachments (uploaded files)

If a leave request has been sent to you that contained an attachment i.e.. Medical Certificate, you are able to view the file again by clicking on the blue paper clip (Files) button.



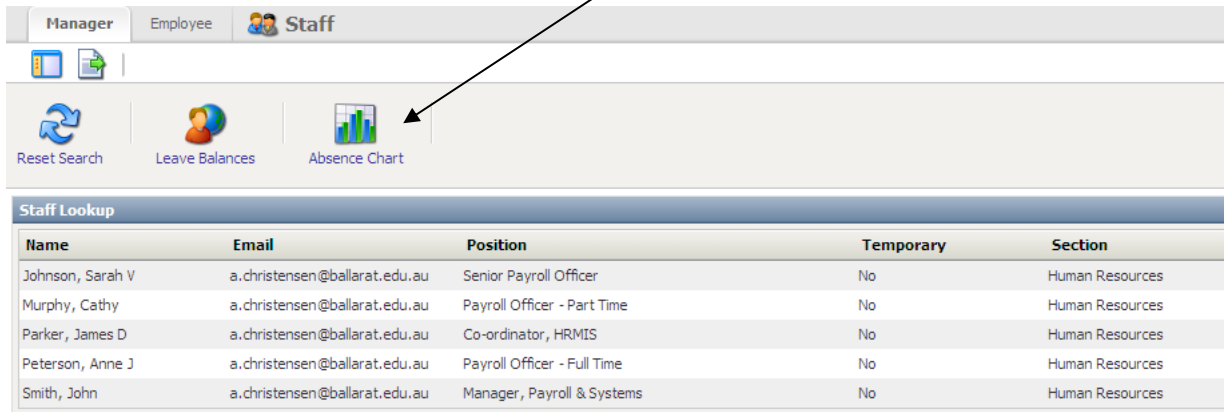
To open, click on the file name highlighted in blue.

Absence chart

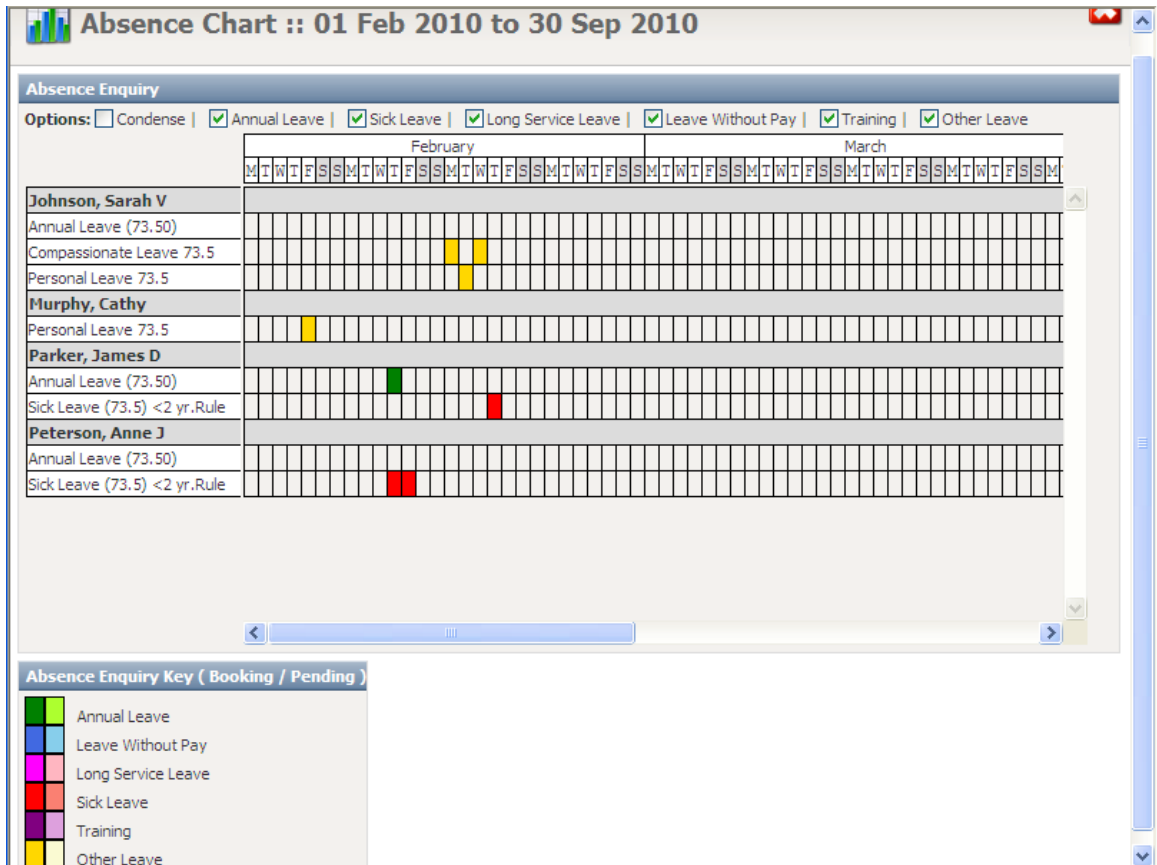
1. After selecting staff using the Search Filter (as discussed earlier) you can view pending/current leave bookings.

This information is displayed on a Gantt Chart which is very useful for finding out the availability of staff in busy work periods and the chart has a colour-coded Key which makes it easier to identify different types of leave.

Select the 'Absence Chart' button to display.



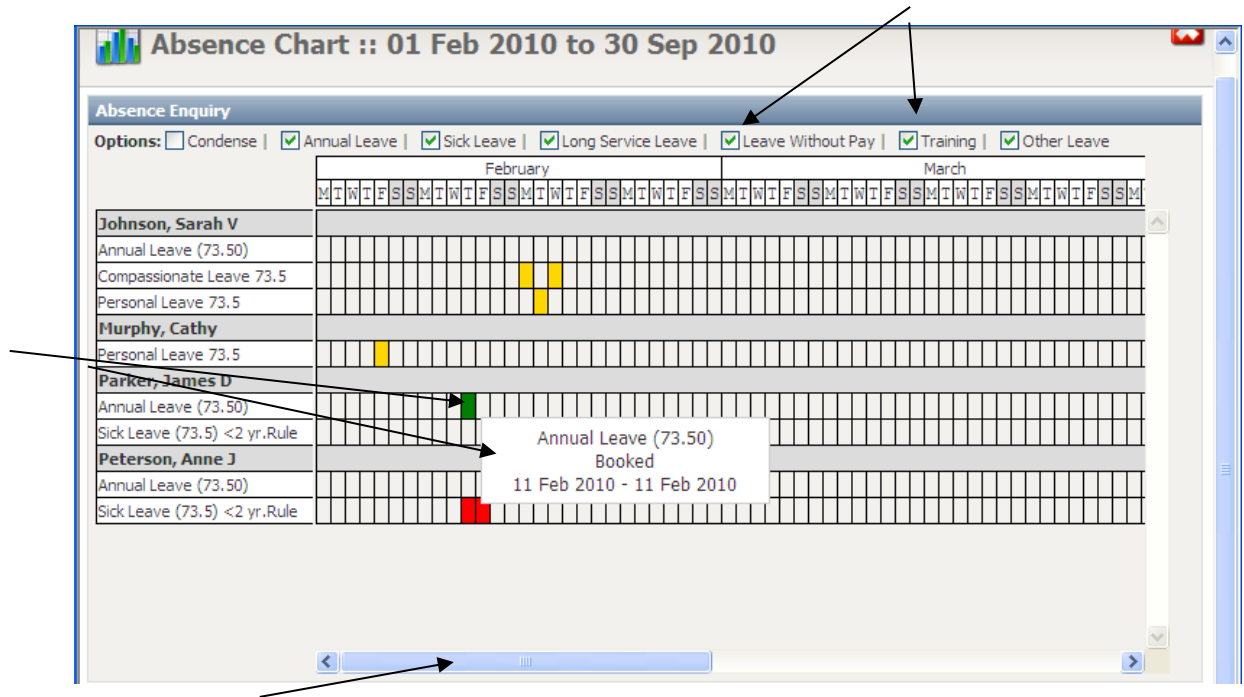
2. The following screen will display. As you can see for the month of February there are several leave bookings. In this example, James booked an Annual Leave day, both Sarah and Cathy booked 'Other' types of leave and both James and Anne had some sick days.



- If you require further information regarding staff booked leave, you can hover the mouse cursor over the coloured boxes.

In the example below, by hovering over the green box, a pop-up window appears identifying the type of leave and start and end dates. In this example, one day of annual leave (booked from 11 Feb to 11 Feb)

You can filter the report to only display a particular type of leave by clicking on the checkboxes above the chart.



Use the scroll bar to view future month leave bookings.

Displaying leave balances for selected staff

- To access leave balances for all selected staff (see 'Searching for staff using Filters' as mentioned earlier) click on the 'Leave Balances' button.

The screenshot shows a software interface with a 'Staff Lookup' table and a 'Leave Balances' button. The 'Staff Lookup' table lists the following staff members:

Name	Email	Position	Temporary	Section
Johnson, Sarah V	a.christensen@ballarat.edu.au	Senior Payroll Officer	No	Human Resources
Murphy, Cathy	a.christensen@ballarat.edu.au	Payroll Officer - Part Time	No	Human Resources
Parker, James D	a.christensen@ballarat.edu.au	Co-ordinator, HRMIS	No	Human Resources
Peterson, Anne J	a.christensen@ballarat.edu.au	Payroll Officer - Full Time	No	Human Resources
Smith, John	a.christensen@ballarat.edu.au	Manager, Payroll & Systems	No	Human Resources

The 'Leave Balances' button is highlighted with an arrow, indicating it is the button to click to access leave balances for all selected staff.

- The following screen will appear. Supervisors/managers have the ability to view leave balances for their staff including annual, long service, personal and other types of leave. You can switch between the types of leave by clicking on the tabs. For the Balance column the system will display the balance in days followed by the balance in hours.

Back To Staff Management

Highlight Leave Balances

Options: Annual Leave Excess | Long Service Leave Excess | Any Leave in Excess | Any Leave Balance Below

Section	Name	Leave	Balance	Excess	As At
Human Resources	Johnson, Sarah V	Annual Leave (73.50)	20.8 / 152.6	0/0	27 Feb 2010
	Murphy, Cathy	Annual Leave (73.50)	2.6 / 38.4	0/0	27 Feb 2010
	Parker, James D	Annual Leave (73.50)	3.7 / 27.2	0/0	27 Feb 2010
	Peterson, Anne J	Annual Leave (73.50)	6.6 / 48.3	0/0	27 Feb 2010
	Smith, John	Annual Leave (73.50)	31.5 / 231.6	0/0	27 Feb 2010

Days Hours

- Another useful feature is the 'highlighting' of leave balances. This feature allows you to specify how many days of leave accrued by a staff member until it is considered 'excessive'. You can enter the amount of days until considered excessive into the fields provided and once this is done you must click on the refresh button. All staff in excess of the value entered will be highlighted in blue.

Highlight Leave Balances

Options: Annual Leave Excess | Long Service Leave Excess | Any Leave in Excess | Any Leave Balance Below

For example, the supervisor/manager would like to know which staff members have Annual leave days exceeding 20 days. They would need to type '20' into the 'Annual Leave Excess' field then click on the refresh button.

Highlight Leave Balances

Options: Annual Leave Excess | Long Service Leave Excess | Any Leave in Excess | Any Leave Balance Below

As seen below, Sarah and John both have an annual leave balance greater than 20 days therefore they have been highlighted in blue.

Section	Name	Leave	Balance	Excess	As At
Human Resources	Johnson, Sarah V	Annual Leave (73.50)	20.8 / 152.6	0.8/4.5	27 Feb 2010
	Murphy, Cathy	Annual Leave (73.50)	2.6 / 38.4	0/0	27 Feb 2010
	Parker, James D	Annual Leave (73.50)	3.7 / 27.2	0/0	27 Feb 2010
	Peterson, Anne J	Annual Leave (73.50)	6.6 / 48.3	0/0	27 Feb 2010
	Smith, John	Annual Leave (73.50)	31.5 / 231.6	11.5/83.6	27 Feb 2010

Processing staff leave requests

1. When a staff member requests leave the request is sent to their supervisor/manager for approval. An email is sent to the supervisor/manager's University email address. The subject line will read 'Leave Request' and the Sender will read 'EmpowerHR (please see below)



2. When opening the email, it should look like the following:



The email will notify the Supervisor/Manager which staff member has requested the leave, what type of leave and for what period. For this example James has requested Annual Leave for one day being 18 March 2010.

3. Now the supervisor/manager can action the request by either logging into the self-service system by selecting the link in the email, or by accessing the site from their browser's 'favourites' list. The self-service link is also available via the Federation website.
4. Once logged into the self-service system ensure you are using the 'manager' section (MSS) by clicking on the 'Manager' tab (as the system may default to 'Employee')



Once logged in you will see 'Actions To Do'. This appears when a member of your staff has requested leave.

5. To action any outstanding leave requests simply select the 'Leave Request' hyperlink.



6. You will now be presented with the following screen. (Please note that Leave Requests records will appear on the same row. The example below has been split into two rows)

As expected, James' leave request has appeared for processing. You will also notice that on the end of the leave request record there are five options/buttons to choose from.

These options are as follows:

Edit button



After selecting the Edit button the following screen will appear.

This allows you to view the request in more detail and view any other leave bookings from that staff member (via the Absence Chart). Once the supervisor/manager has reviewed the request, they can 'Accept' the request, 'Redirect' it to a different manager for approval, 'Reject' the leave, or 'Return' the request to the employee adding any comments if amendment/s are required.

Accept button

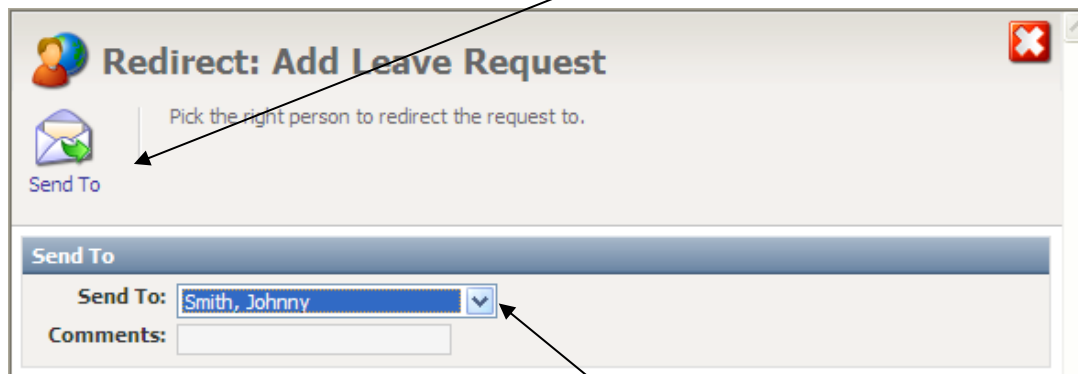
This button should be clicked if you are happy for the leave request to be approved. Once 'Accepted' an email will be sent to the staff member who made the request acknowledging that it has been approved and it has been passed on.

Requests are passed on to the Payroll team for final approval.

Once Payroll has approved, the leave request it will become a current booking.

Redirect button

After clicking on the Re-direct button the following screen appears:



If a leave request was sent to you incorrectly or you believe another manager would be better suited to approve the leave, then you can redirect it to another manager.

Simply click on the drop-down menu, select the person you would like to re-direct the request to then click on the 'Send To' button.

An email will be sent to you confirming you have redirected the leave and an email will also be sent to the manager you have re-directed the request.

Reject button

To reject a leave request for whatever reason, simply select the 'Reject' button

Another screen will appear where you are able to add a comment to why you may have rejected the leave request.

You must click on the 'Confirm' button to 'Reject' the leave request. An email will be sent to the staff member who requested the leave explaining that it has been rejected.



Return button

Managers also have the ability to Return the leave request back to the sender.

There are a number of reasons why this may be required, for example, an error on the leave request (wrong date, conflict etc), the request was sent to the wrong manager, or any other details the sender may need to adjust before approval.

A comment/reason to why the request is being sent back can be entered into the 'Comments' field.

The 'Confirm' button must also be clicked on for the request to be sent back and an email will be sent to the staff member to notify them that the requested leave has been returned to them.



Attachments button

If the leave request sent to you has an attachment i.e.. medical certificate, you are able to view the file by clicking on the blue paper clip (Attachments) button.



To view the attachment select the file name highlighted in blue.