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:

4. Login details will be as follows:

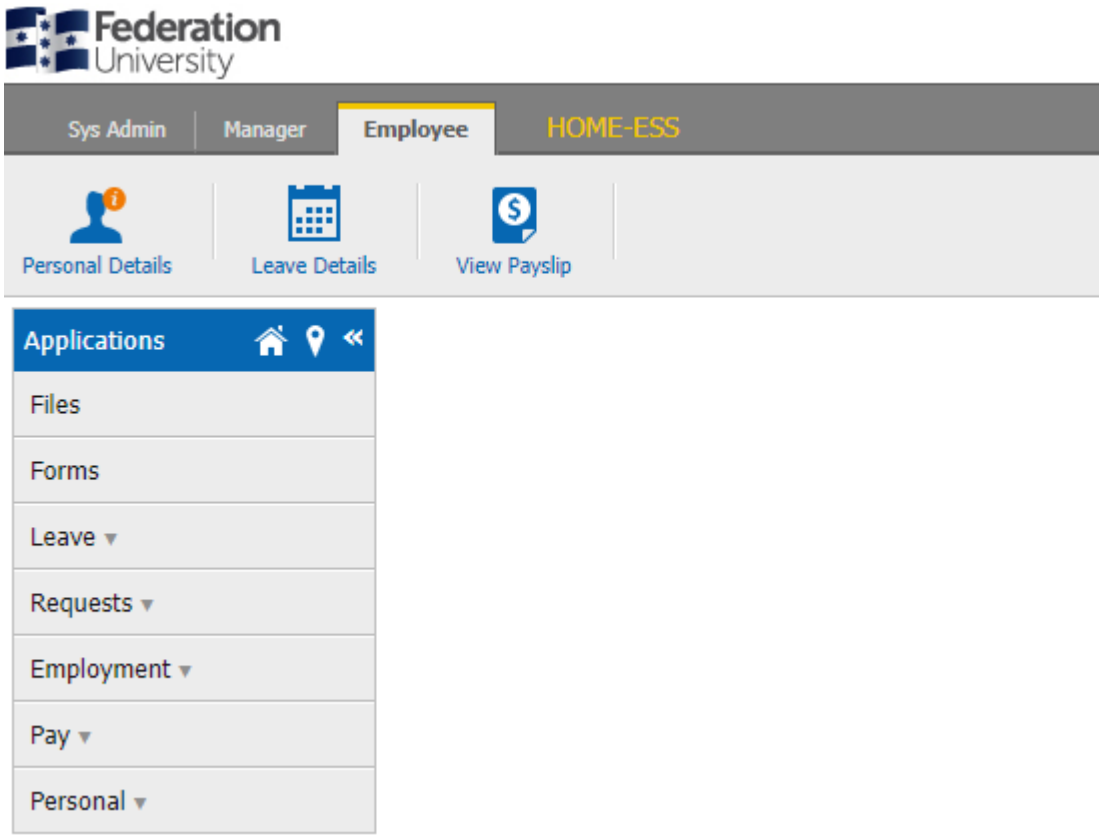
   Username and password
   Your ESS login credentials are the same as your Federation network login credentials. (the same username and password you use to login to the Federation network, email etc.)

   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.

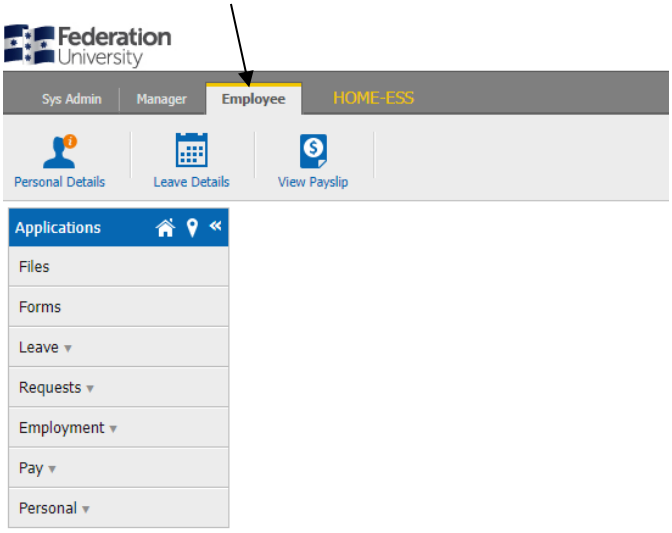
   Click the 'Sign On' button after entering your login credentials

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:

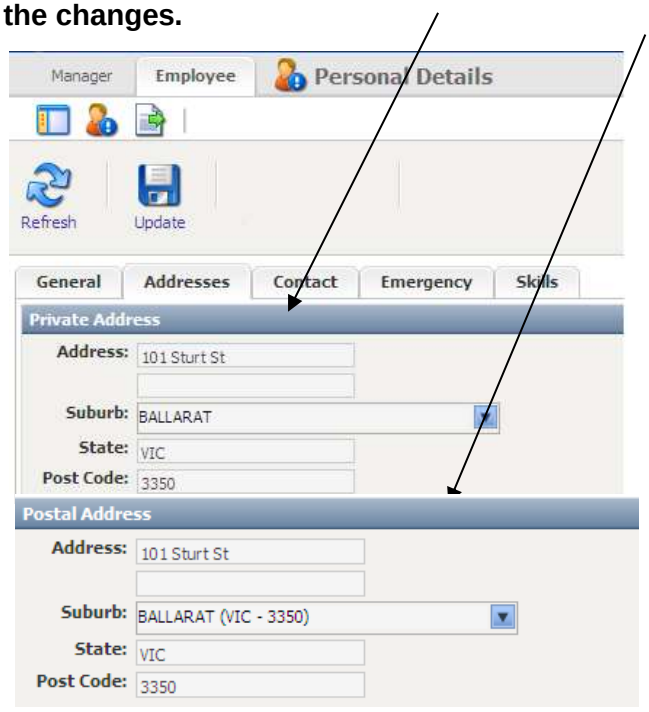


2. Then select the ‘Personal Details’ button

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.



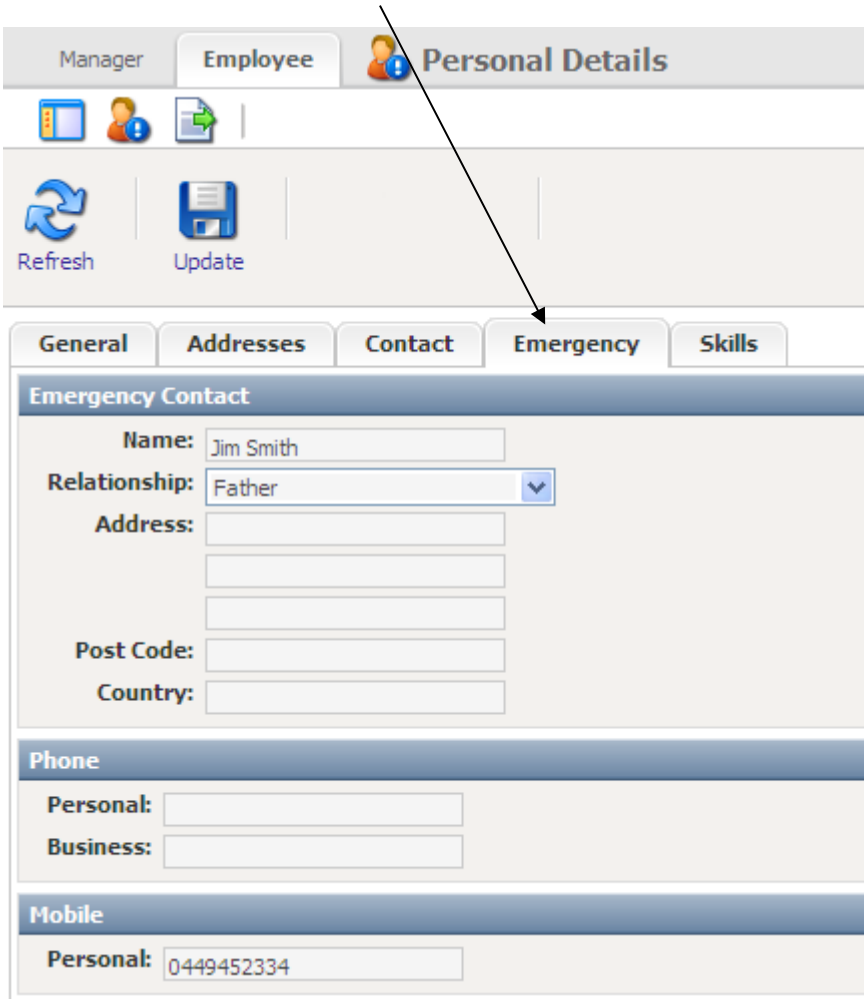
You are able to change your contact details by clicking on the ‘Contact’ tab. After amending the data in the fields provided, click on the ‘Update’ button.

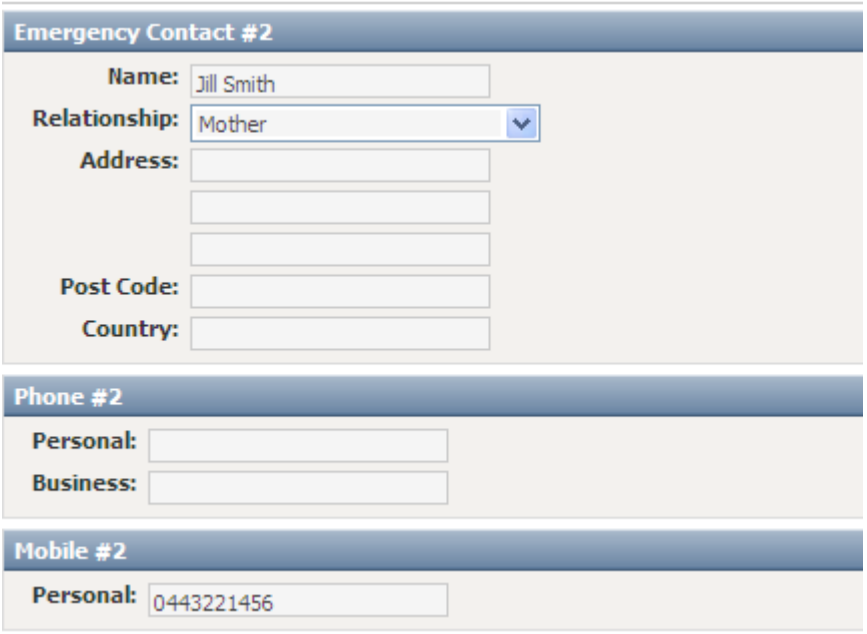
It is important to have the business email field populated with your federation staff email address to ensure email notifications can be sent to you when requesting leave via ESS.

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.

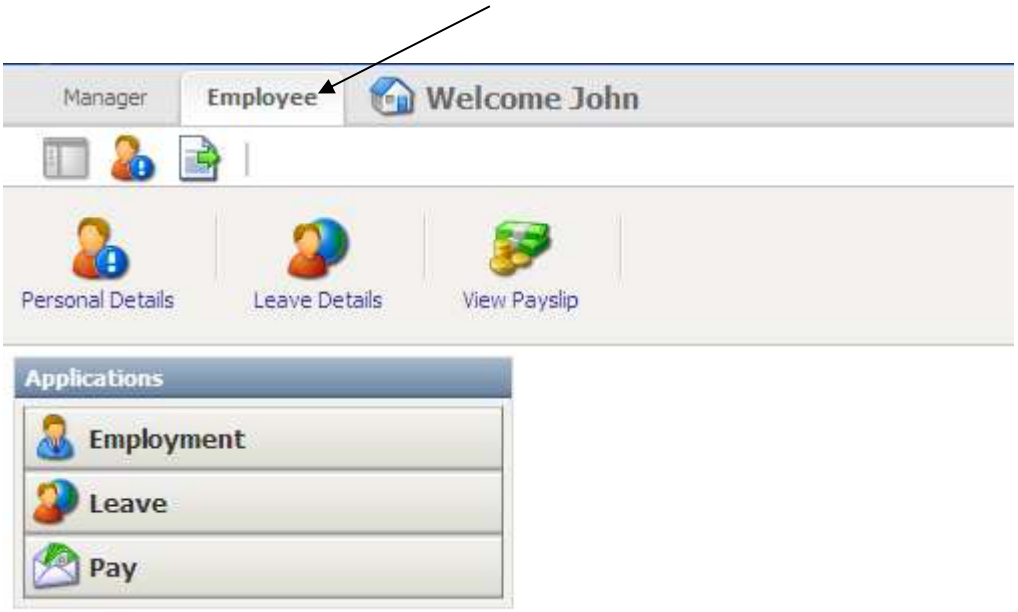




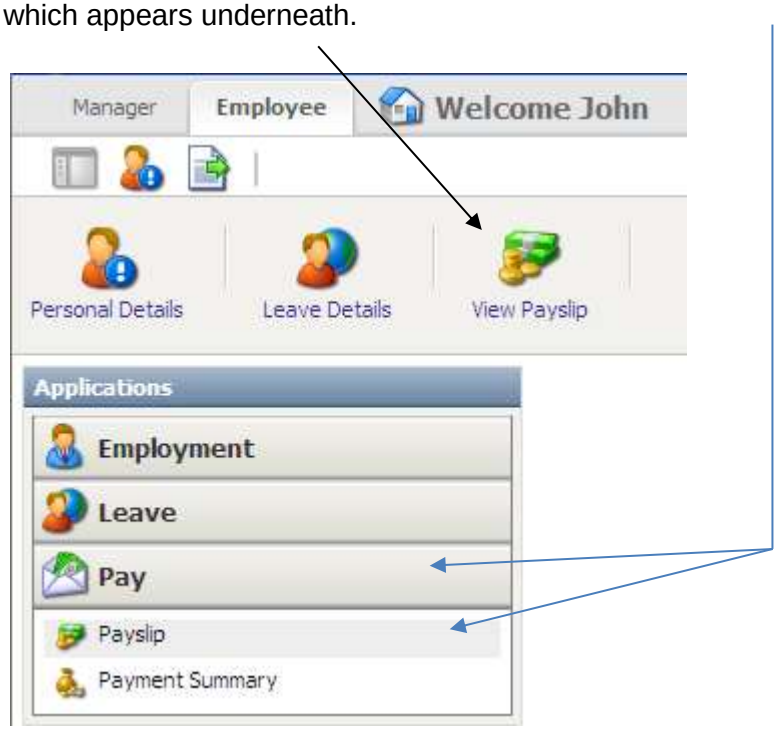
Viewing payslips

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.

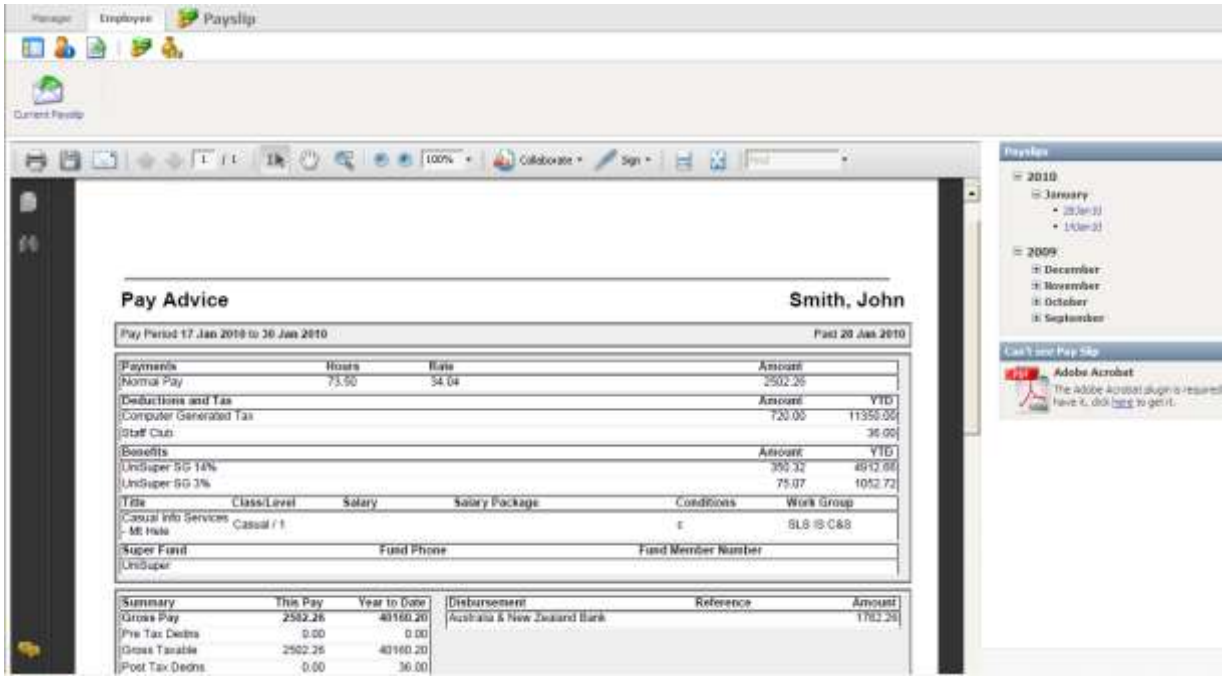
1. To access your payslip, click on the 'Employee' tab as seen below:



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.

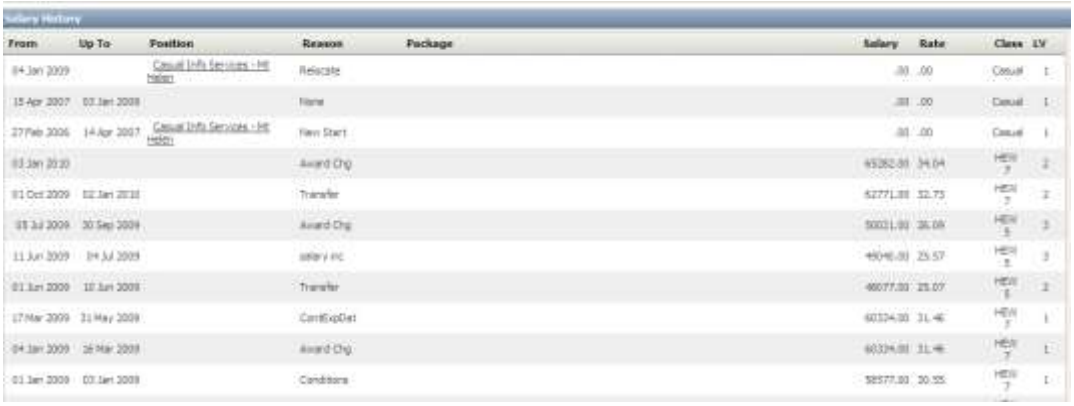
Viewing employment history

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.

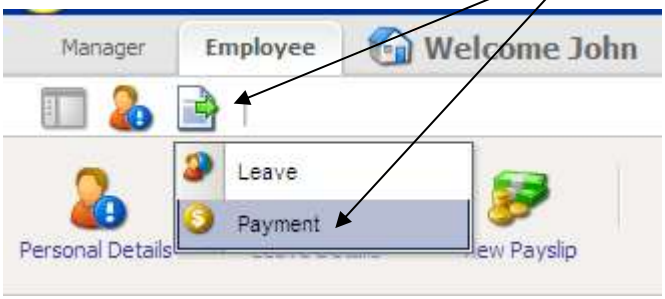


Changing payment instructions (changing bank payment details)

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.

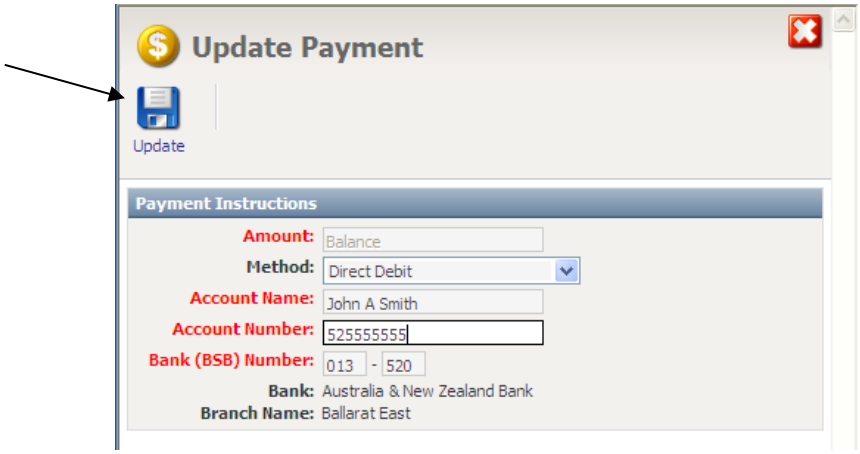
4. Select the 'Change Instructions' button to amend or add new payment instructions. (ESS allows you to add more than 1 payment instruction. For example, your pay can be distributed to more than 1 bank account)

5. 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.

6. To change/amend your current payment instruction please click on the 'Change' on located on the 'Not Submitted' record.

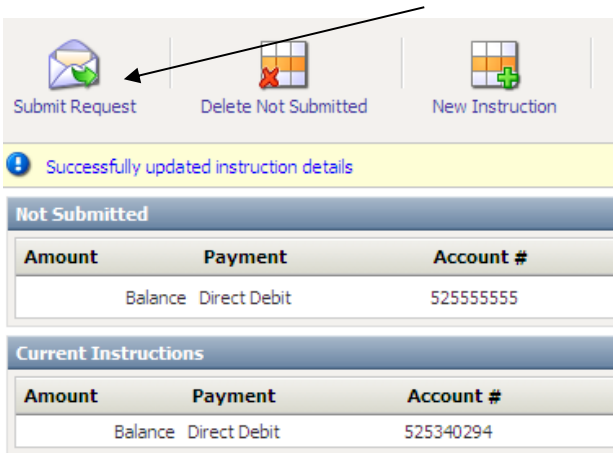
7. The following screen will appear. Please ensure all details are correct and that every field has been entered. Once completed, click on the 'Update' button.



8. 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.

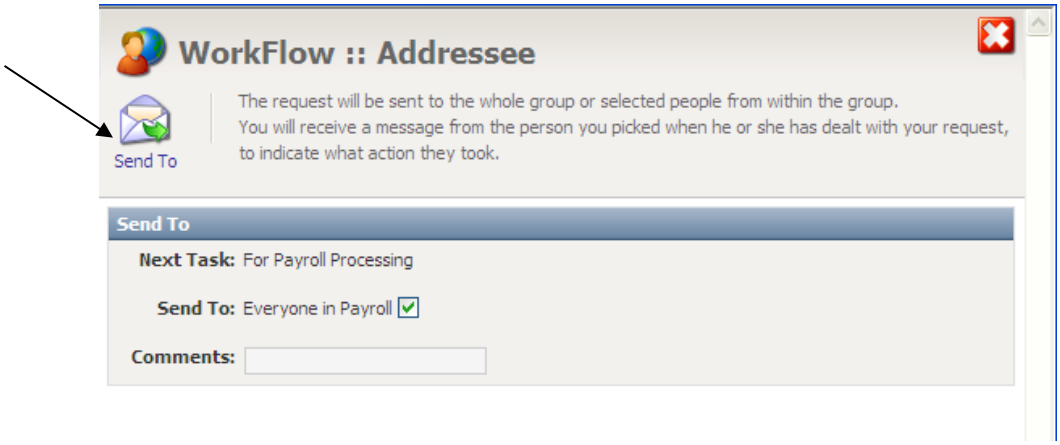
   Please note that your new payment instruction still has not changed on the system. There are two more steps you will need to complete before the changes you made will come into effect.

9. You must now click on the ‘Submit Request’ button.



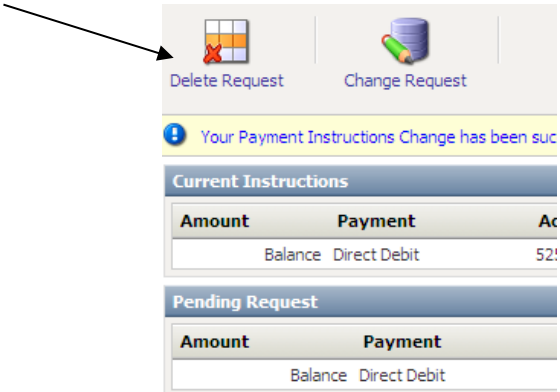
10. Use the ‘Send To’ button on the screen below, for your new bank details to be sent to Payroll for approval.

    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.

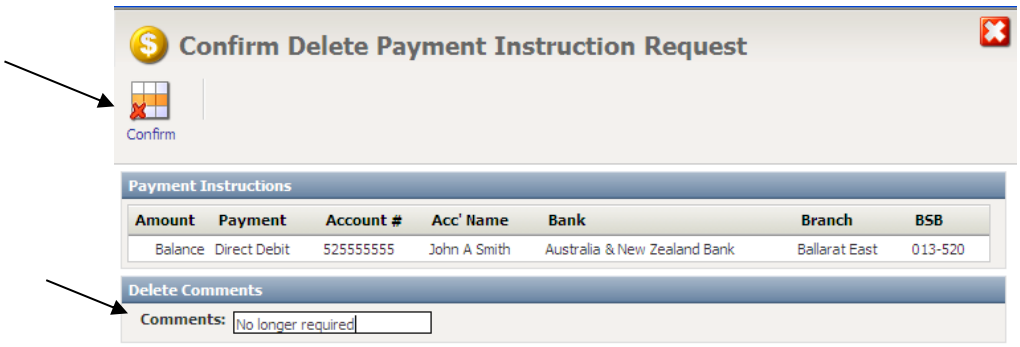


11. You will notice that the ‘Not Submitted’ record will now read as a ‘Pending Request’ until the new payment instructions are approved by payroll.

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

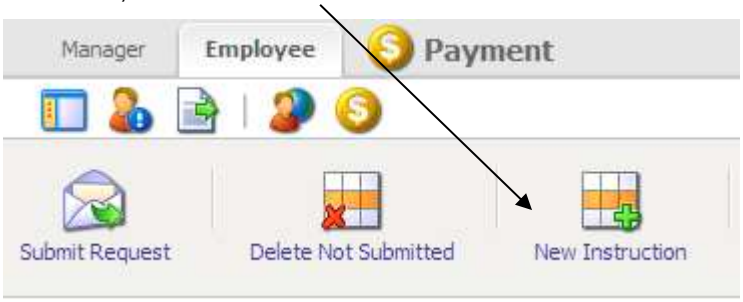


13. Select the ‘Confirm’ button to confirm that you want to delete the request.
    You can also type in a comment on the ‘Comments’ field explaining why you no longer want the changes to go ahead (this is optional).



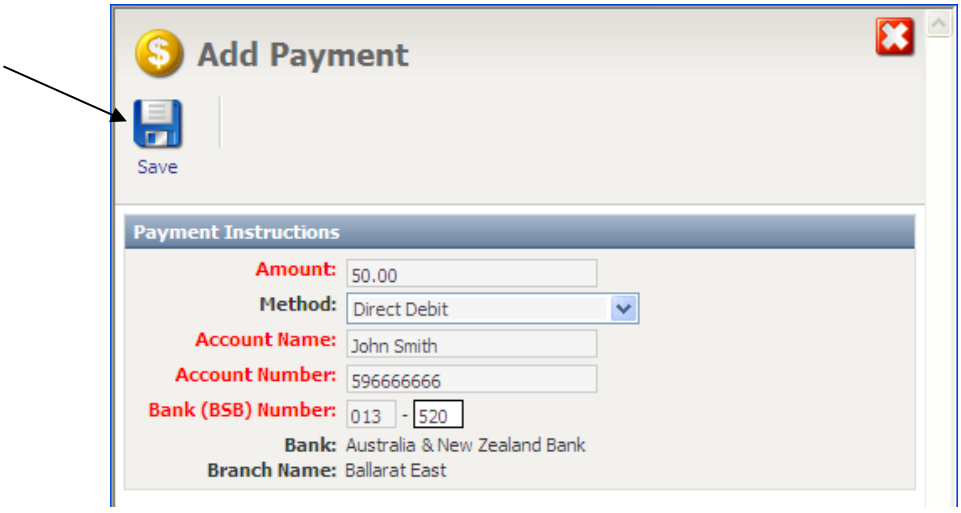
14. Another feature you may find useful is the ability to add more payment instructions and specify how much of your wage goes into a specific bank account.

    To do this, select the ‘New Instruction’ button



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

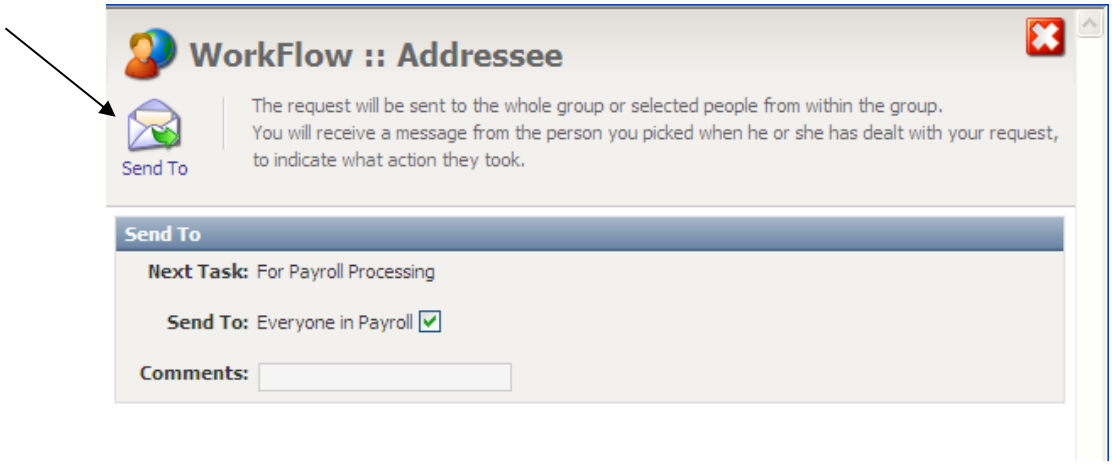
    After you have entered your details, click on the ‘Save’ button.



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.

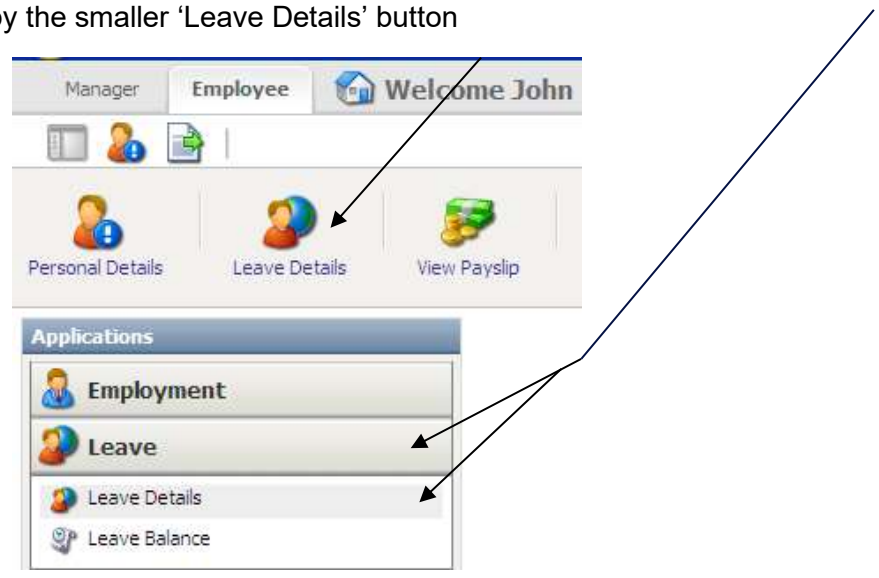
- All other types of leave (leave without pay, maternity leave, WorkCover and long service leave) are all unavailable in self-service. Please continue using the existing paper-based forms for these types of leave.

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.

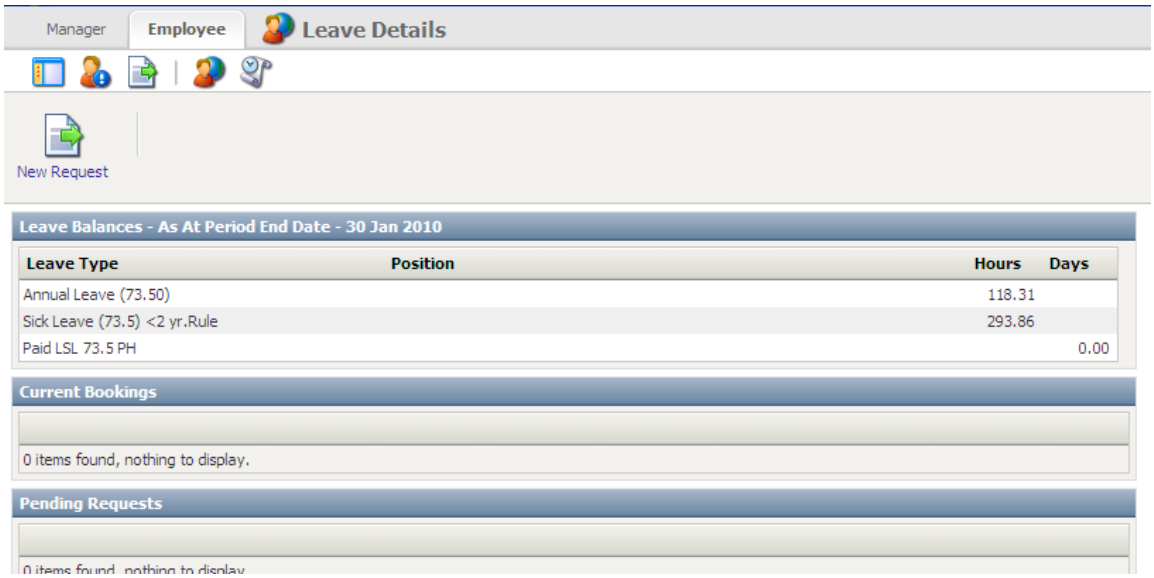
Booking annual leave – example

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

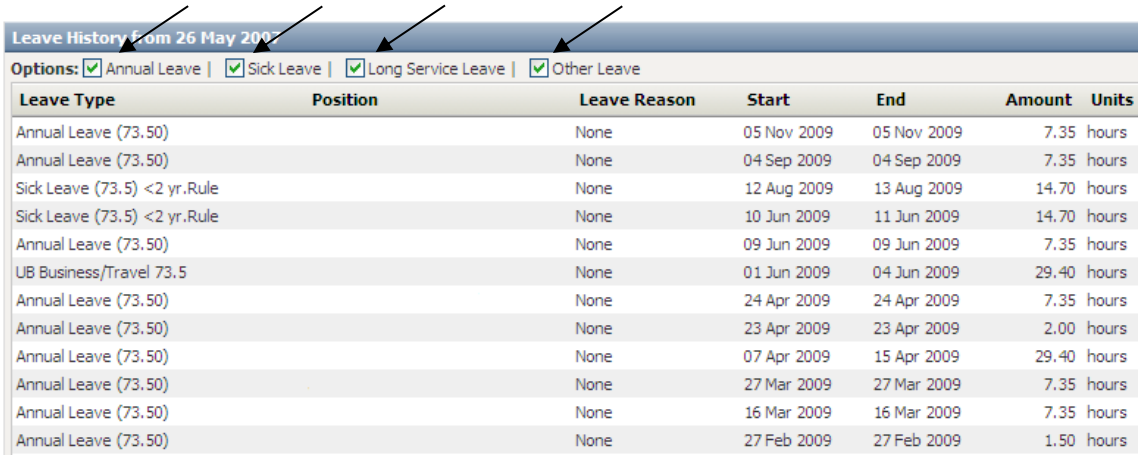
2. Now select either the larger 'Leave Details' button or click on the 'Leave' button followed by the smaller 'Leave Details' button



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



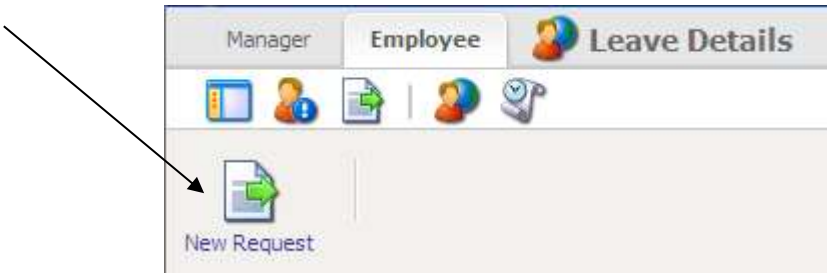
4. You will also notice a window displaying all of your leave history which you are able to filter by using the check-boxes. For example, you may only want to display all Sick Leave you have taken.



5. 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).

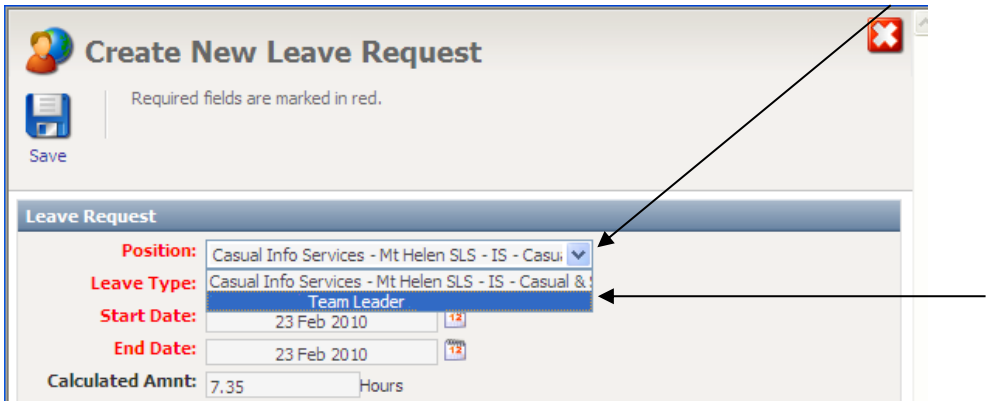
   To book leave, select the 'New Request' button.



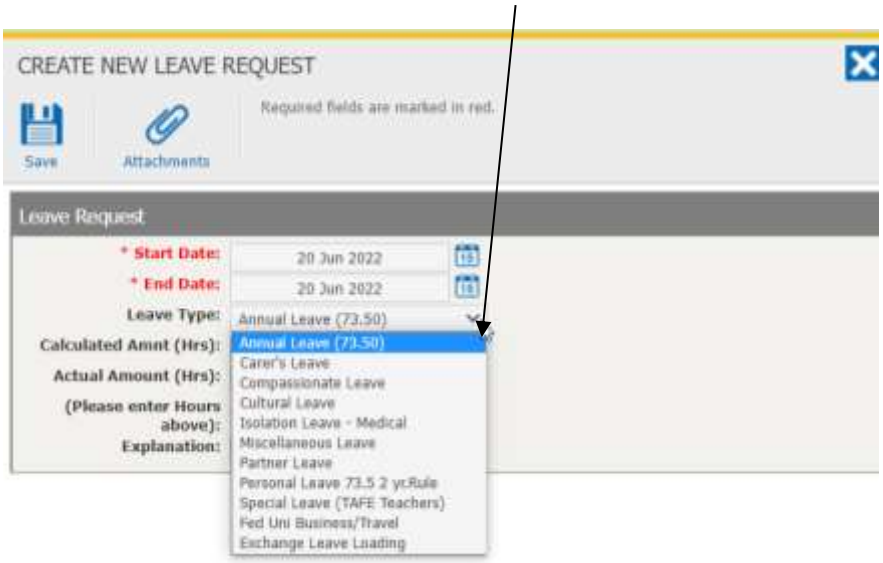
6. The following screen will be displayed.

7. 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.



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



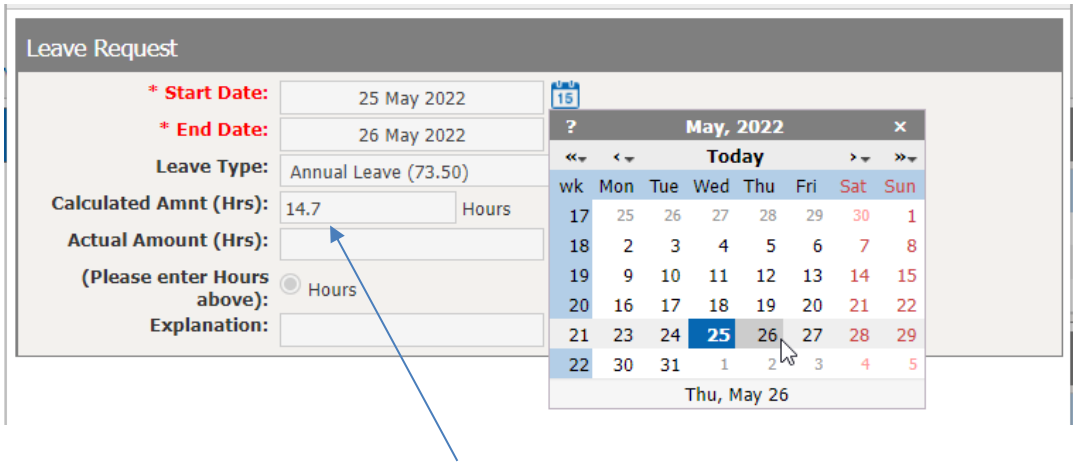
   A reminder that all other types of leave (leave without pay, maternity leave, WorkCover and long service leave) are all unavailable in self-service. Please continue using the existing paper-based forms for these types of leave.

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)

   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.



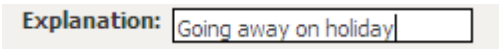
   You will notice that the 'Calculated Amnt (Hrs)' field is automatically populated.

   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

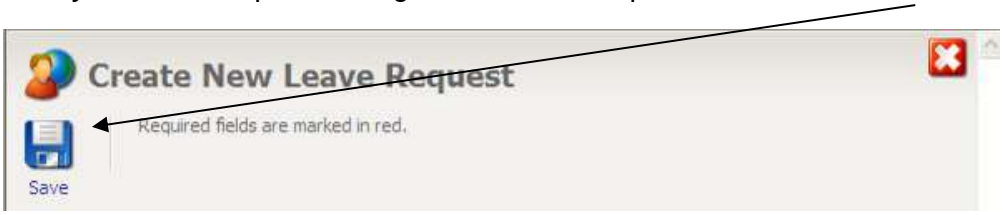
10. The 'Actual Amount' field is populated by the user, and is used to confirm that the 'Calculated Amount' is correct. Please enter the same value as the 'Calculated Amount'

    (this number should only be less for one-day bookings, and only where a full day is not being used).

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



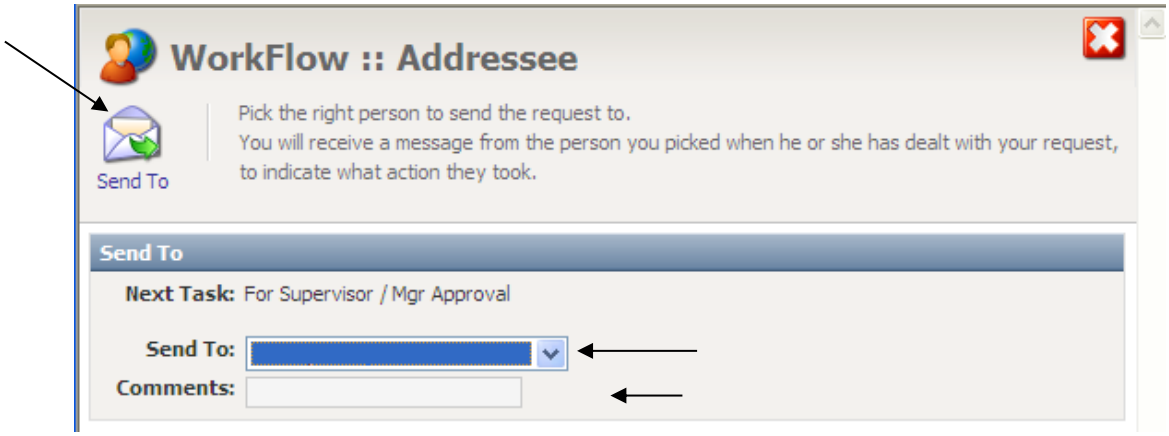
12. After you have completed filling out the leave request form select the 'Save' button



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.



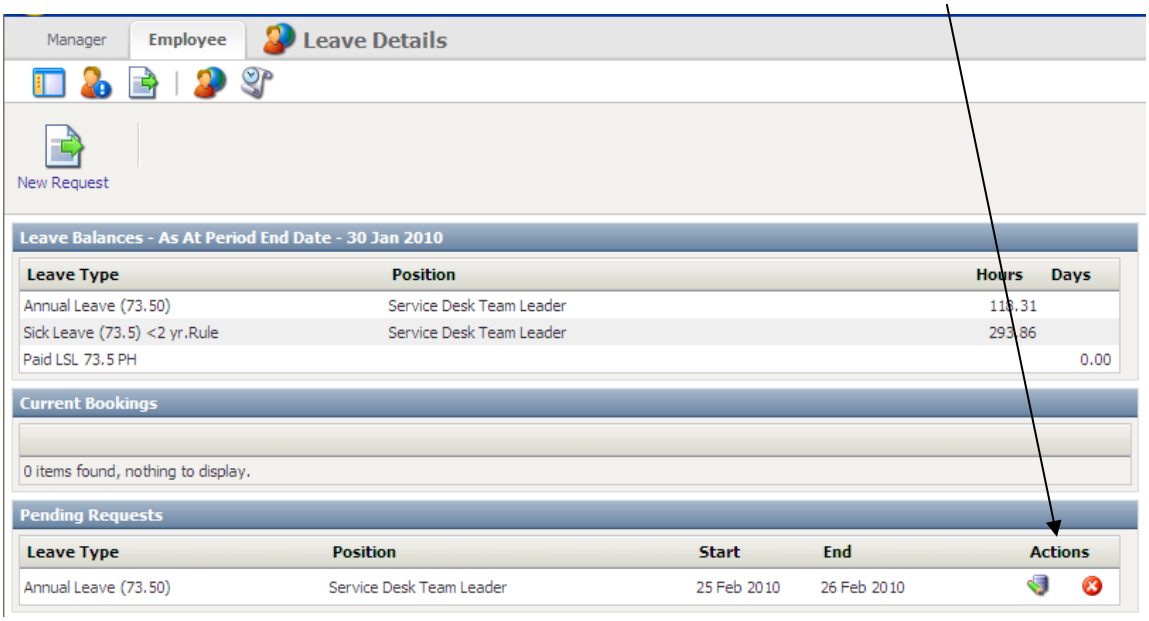
14. Should another screen appear after you have clicked on the 'Send To' button, it will be asking if you would like to book any further leave for any other positions you may hold (which position you are using the leave for).

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

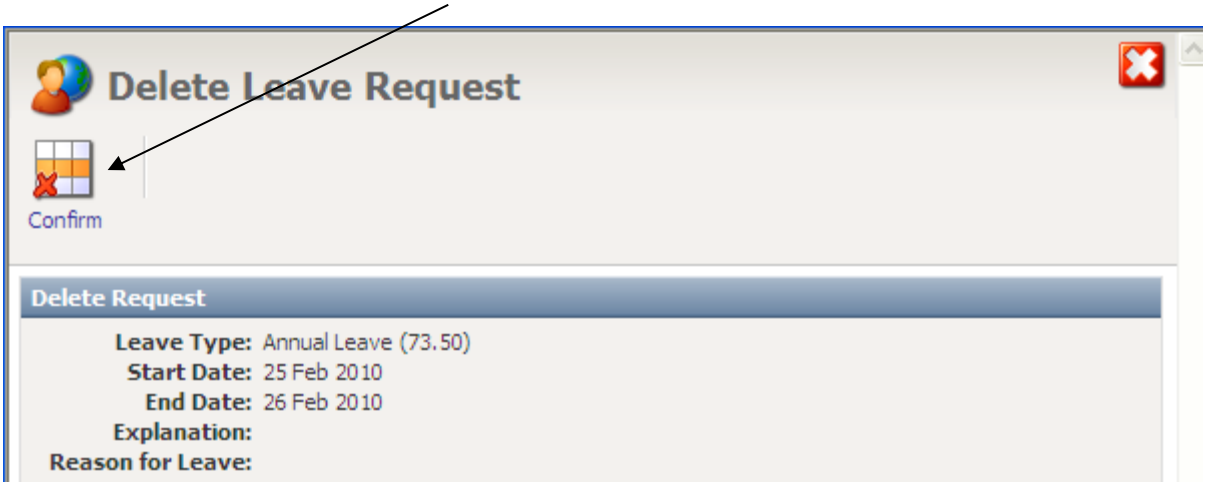
    In most cases, the 'Not Required' button can be selected.

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).



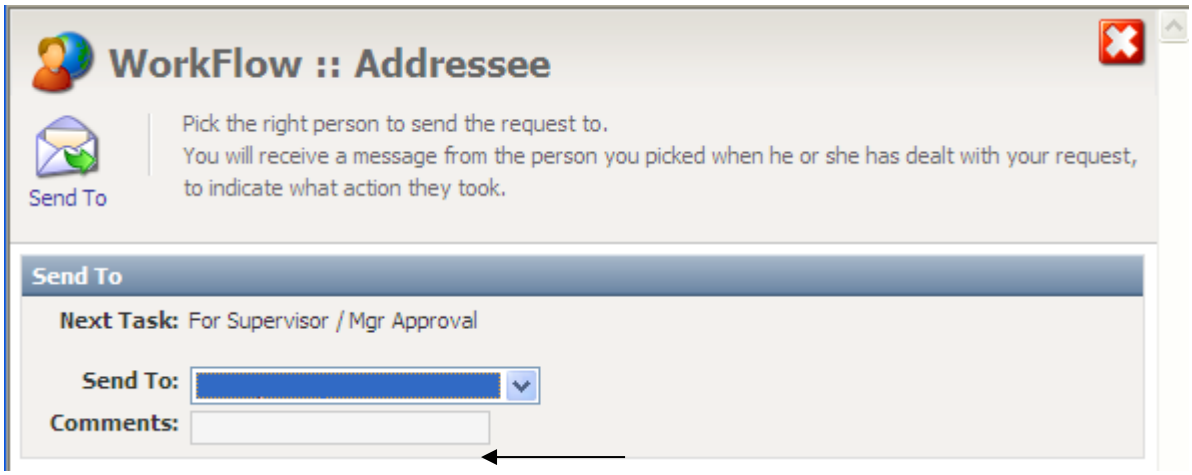
16. You will then need to select the ‘Confirm’ button to delete a leave request.



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

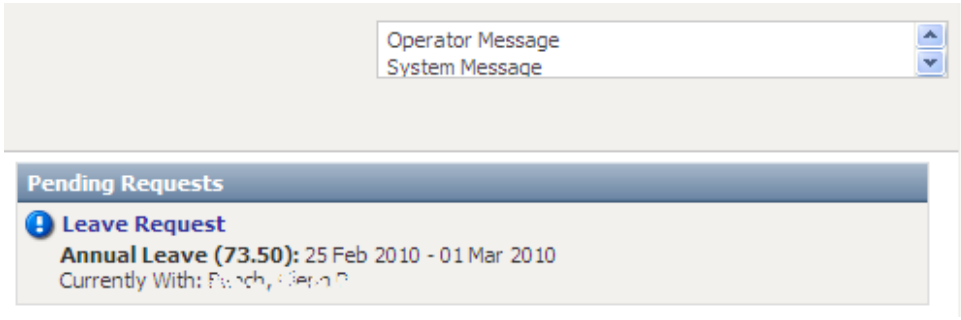
18. Please note, if you make a change to your leave request, you will need to send it again to your supervisor/manager for approval.

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



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.



    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.

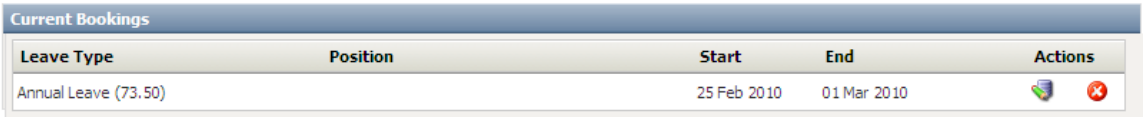
    The email will look like the example below:

    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.



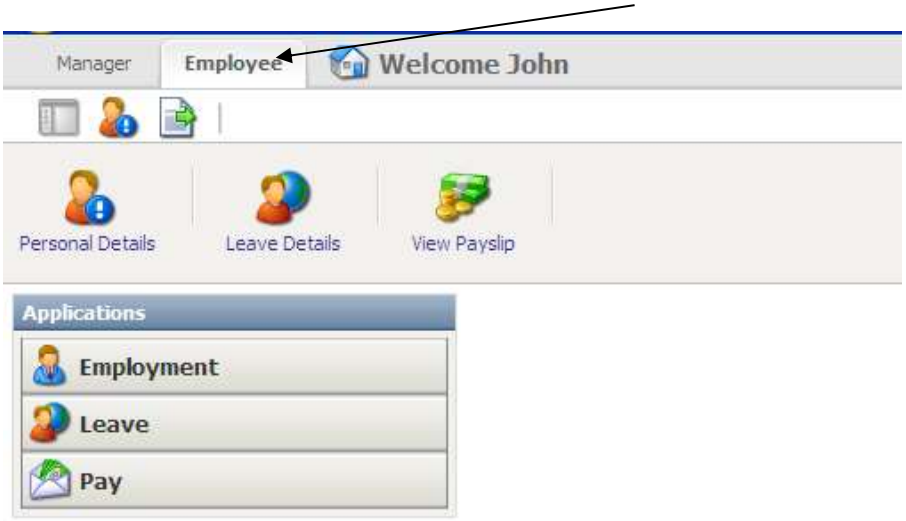
Uploading attachments to a leave request - personal leave example

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

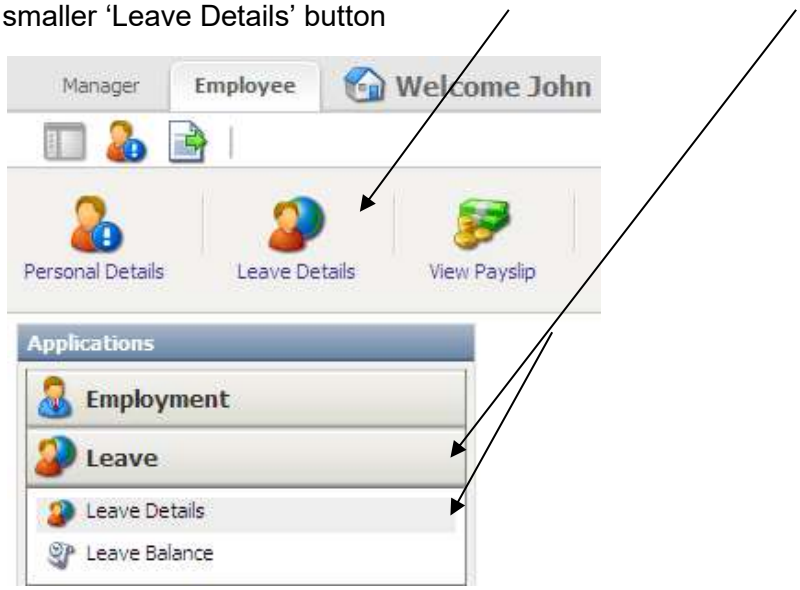
This is particularly useful for personal leave bookings. You can now attach a scanned, electronic copy of a medical certificate to your leave booking, and you, your supervisor/ manager and Payroll, will be able to view the document.

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.

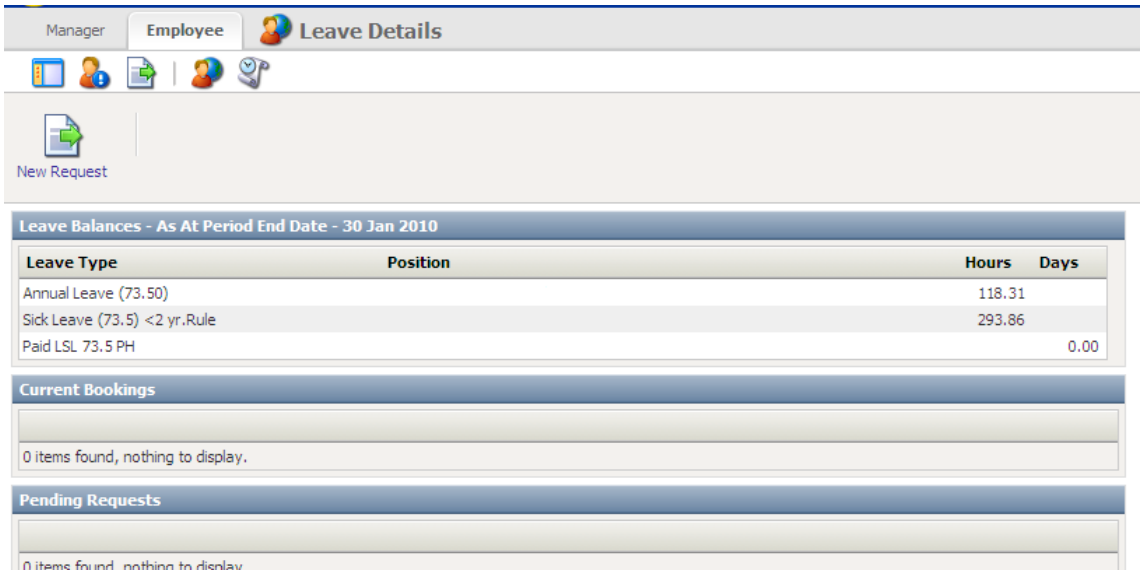
1. To make a personal leave booking click on the ‘Employee’ tab.



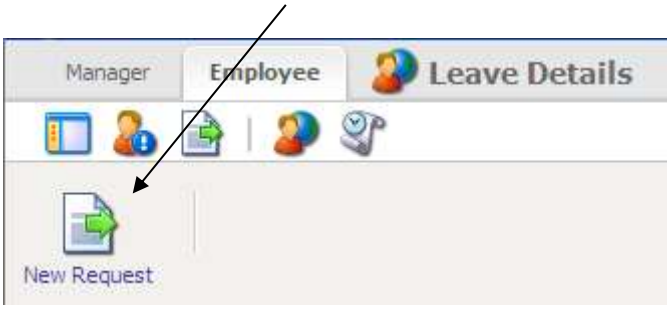
2. Then select either the larger ‘Leave Details’ button or the ‘Leave’ button followed by the smaller ‘Leave Details’ button



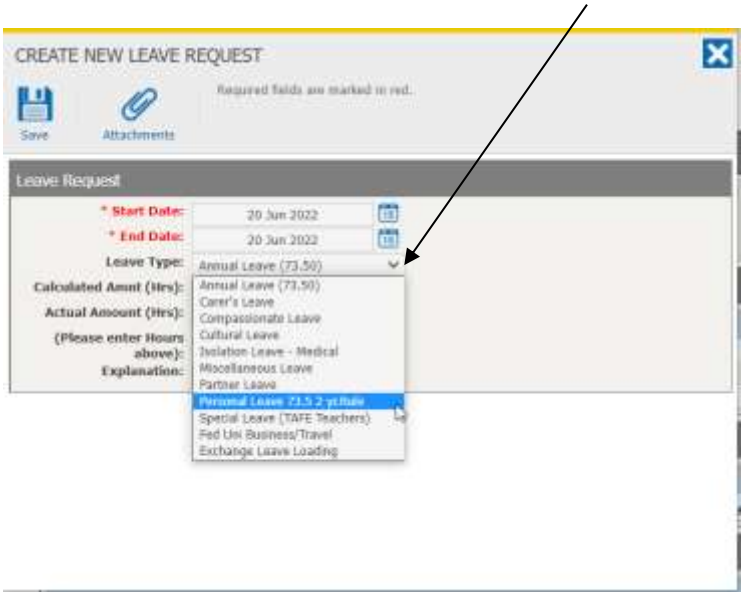
3. The following screen will appear displaying the current leave balances/entitlements, any current leave bookings you have, and any bookings still awaiting approval.



4. Click on the 'New Request' button.

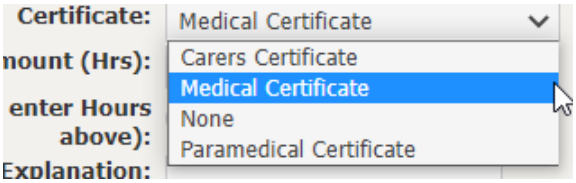


5. Then select Personal Leave from the 'Leave Type' dropdown menu.



6. 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)



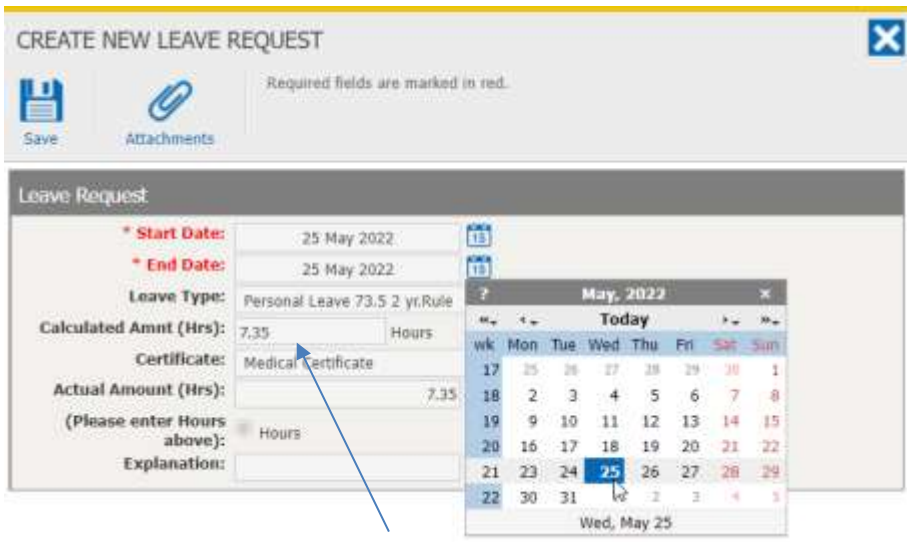
It is very important that the Certificate type is selected as this identifies whether the approvers need to look for an attachment for this specific request.
In this example the user has selected 'Medical Certificate' as the Certificate type.

7. 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.

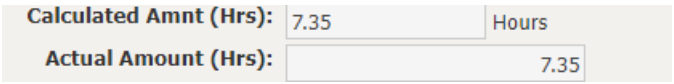


You will notice that the 'Calculated Amnt (Hrs)' field is automatically populated.

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

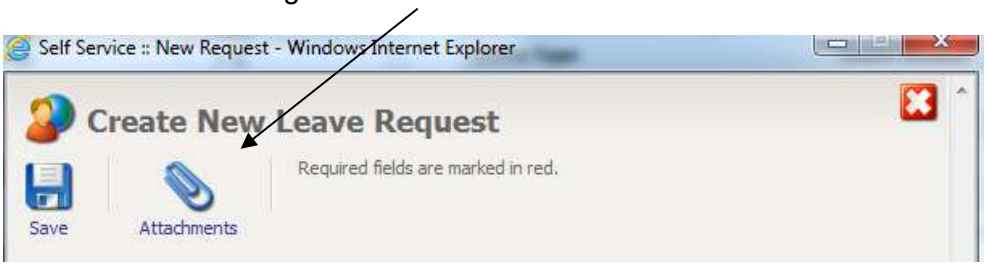
8. The ‘Actual Amount’ field is populated by the user, and is used to confirm that the ‘Calculated Amount’ is correct. Please enter the same value as the ‘Calculated Amount’

   (this number should only be less for one-day bookings, and only where a full day is not being used).



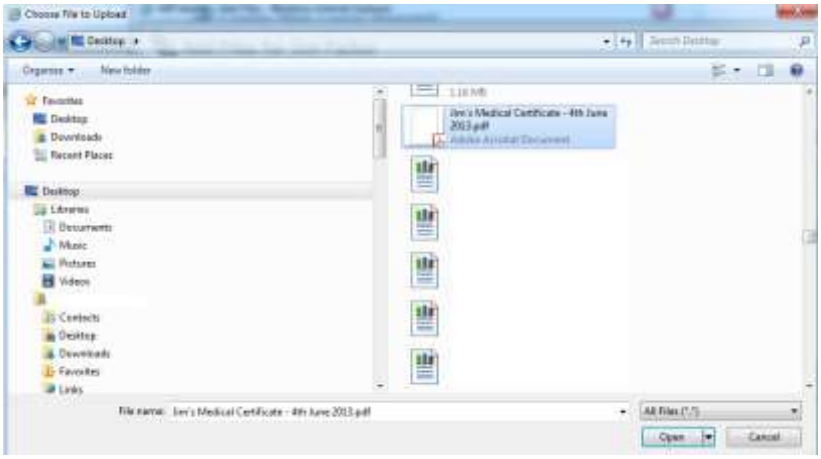
9. The ‘Explanation’ field is an optional field for staff that wish to give more detail to why they are booking the leave.

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.

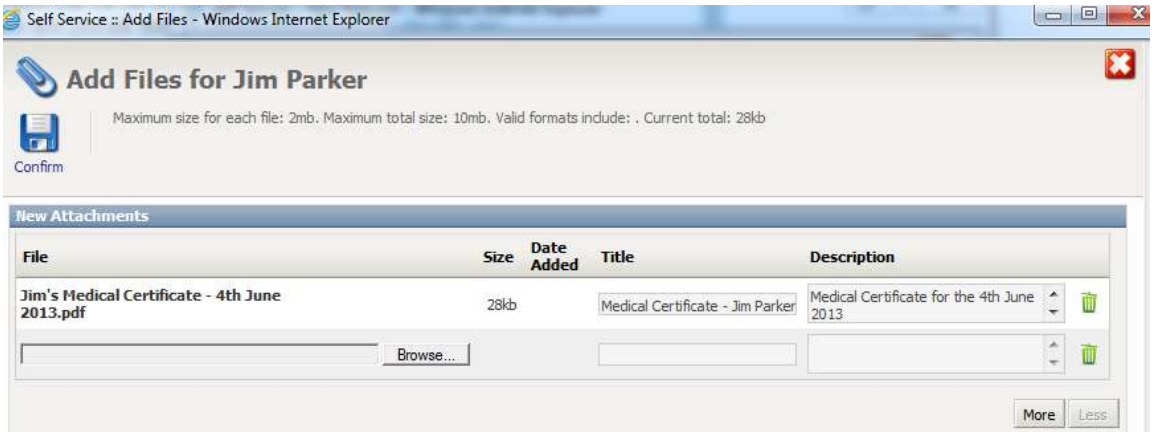
12. Select the appropriate file for upload by double-clicking on it or by selecting the file and clicking the ‘Open’ button.



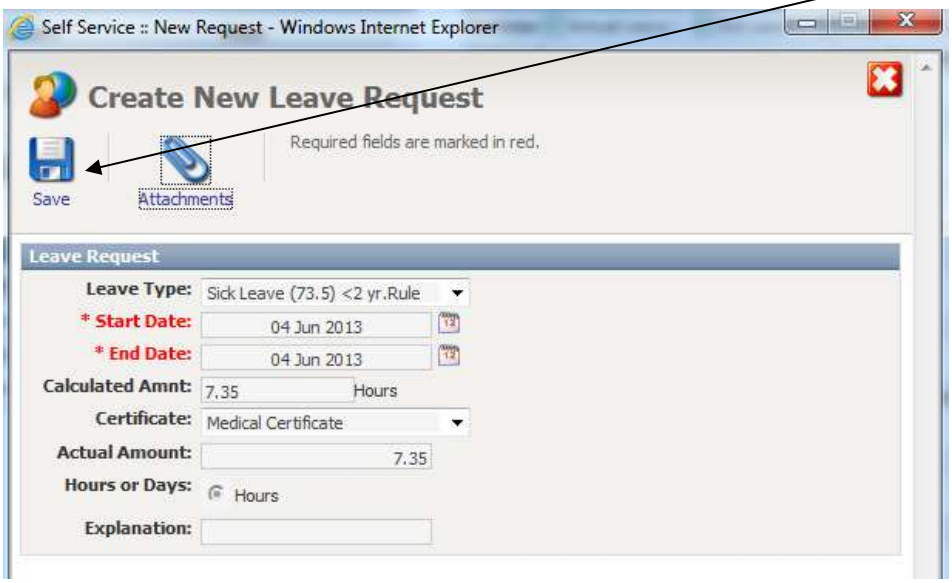
13. After selecting the file for upload you must also type in a ‘Title’ and ‘Description’ for the attachment. This should be something meaningful so that you will be able to find and review the file at a later time.

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.



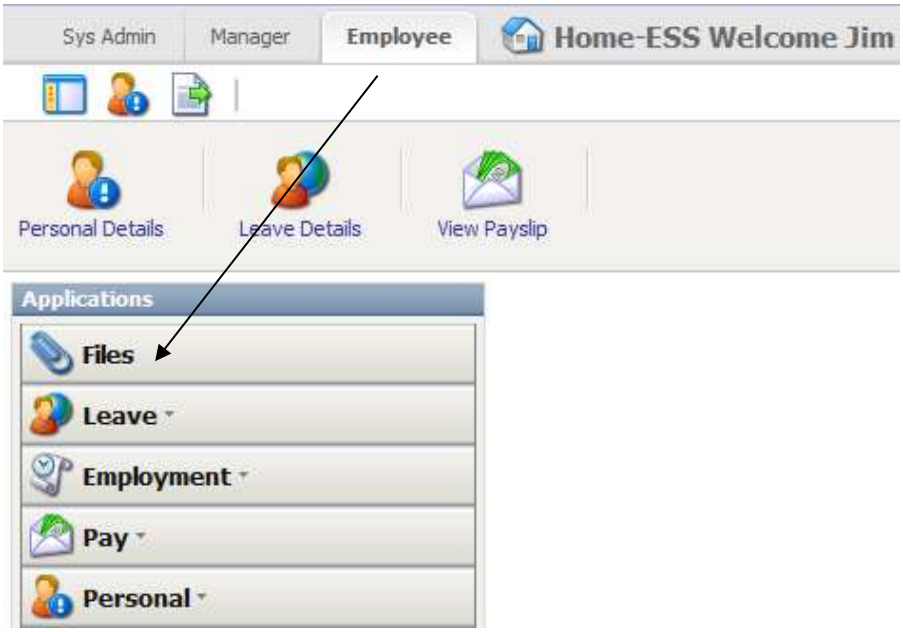
17. The final step in the leave booking process is for you to send the leave request to your supervisor/manager for approval. Please select the supervisor/manager you report directly to from the drop-down menu.

    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.

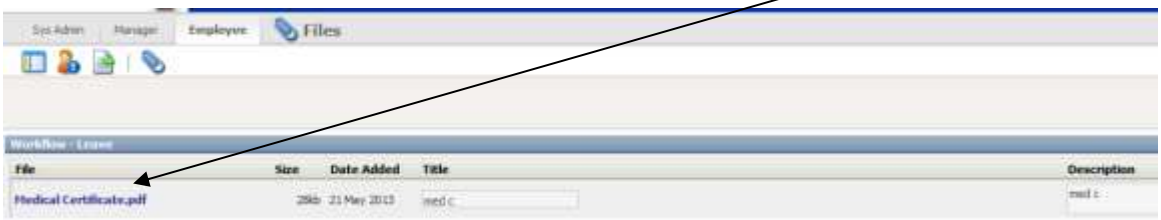
    Finalise by selecting the ‘Send To’ button. An email will be sent to your supervisor/manager alerting them that you have submitted a leave request for action

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.



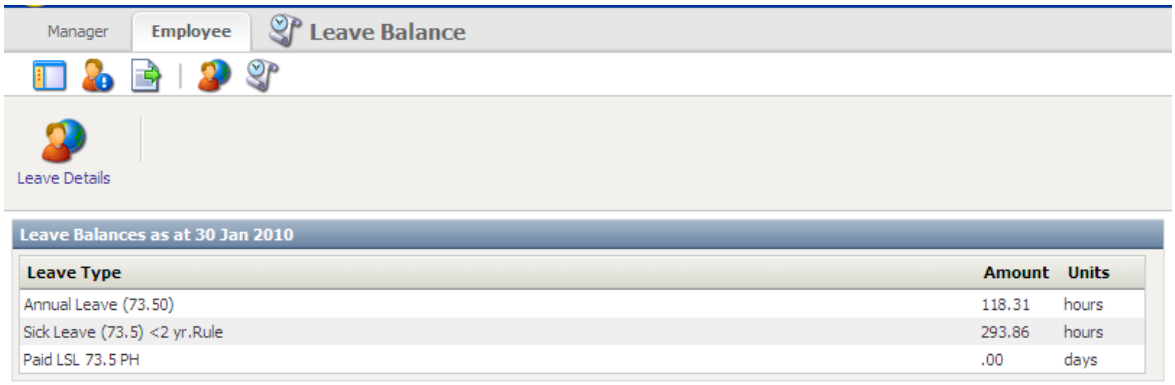
2. You can open all historical attachments by simply selecting the blue file name(s) hyperlink listed on the following screen



Viewing leave balances for future dates

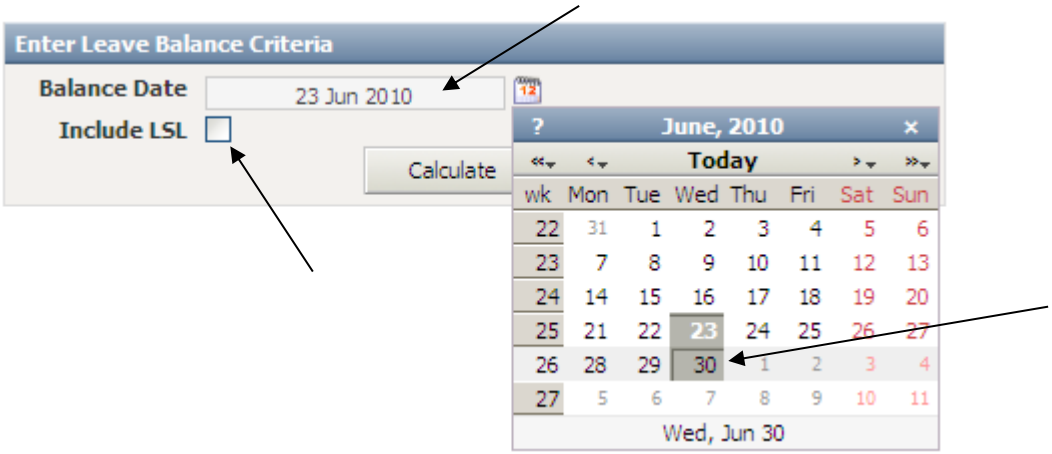
1. If you wanting to know what your leave balance will be at a specific date, you can find out by selecting the Employee Tab, then the ‘Leave’ button, then selecting the ‘Leave Balance’ button.

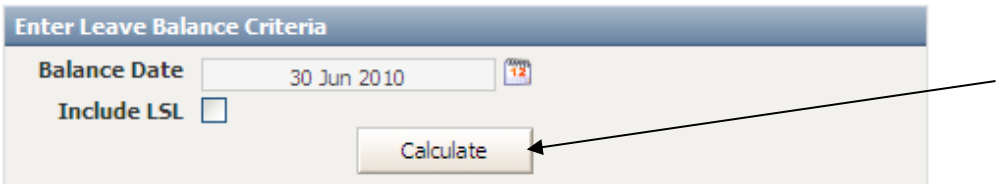
2. The following screen will display



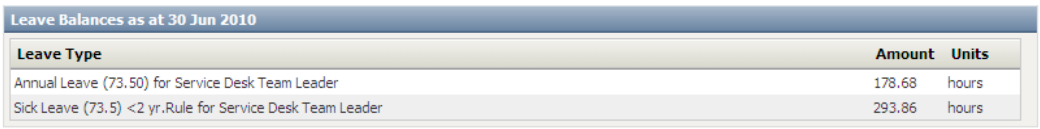
3. For the system to calculate future leave entitlements you can select the calendar icon to the right of the 'Balance Date' field and specify a date.

   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)





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



Operation manual

Manager self-service (MSS)

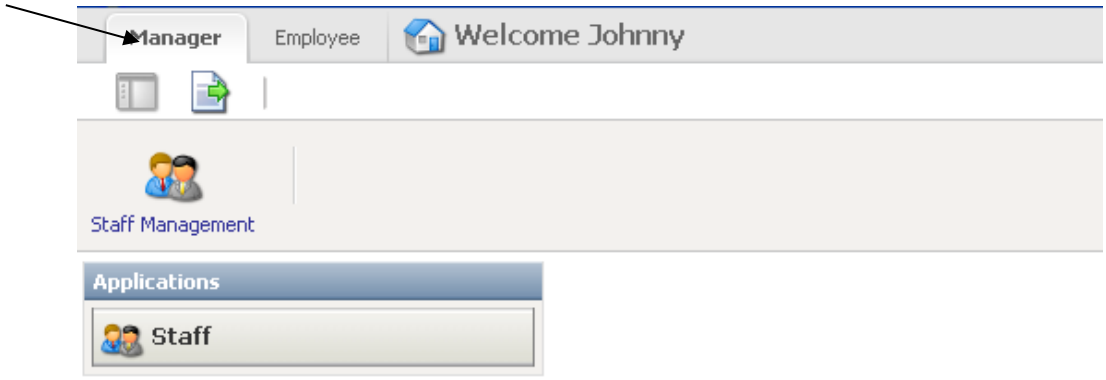
Prepared by
Andrew Christensen
Senior HR Systems Administrator
Status: Final | Version: 7.2 | Date: 20 June 2022

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 and 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.

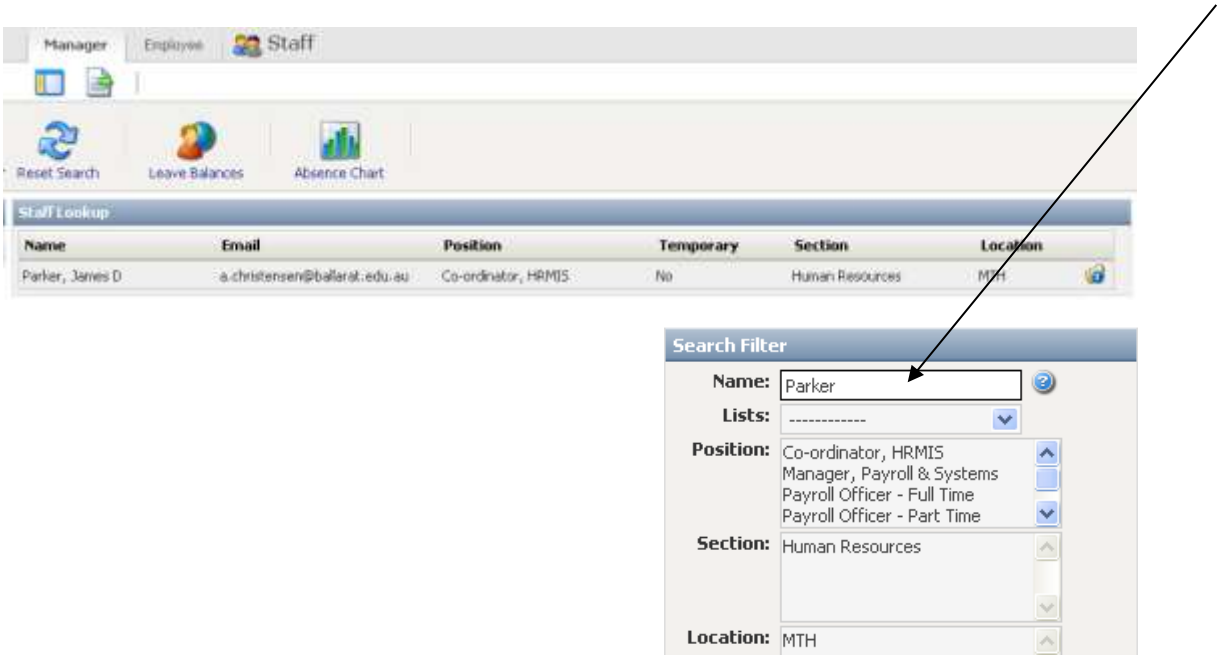
3. The following screen will appear. This is where the supervisor/manager can select the desired team members for review.

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.

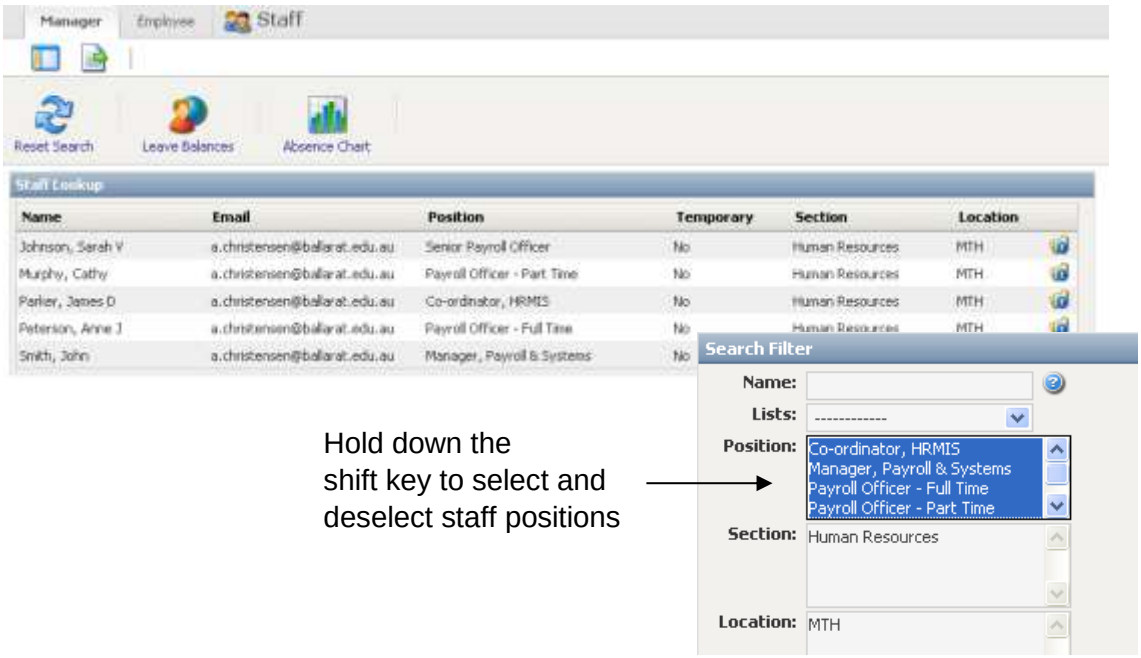
Searching staff by name

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.



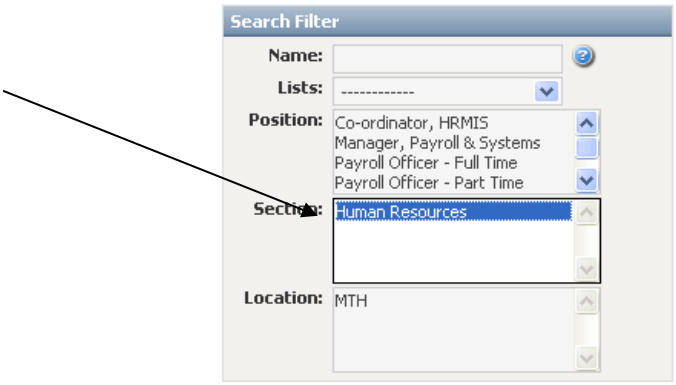
Searching staff by position

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.



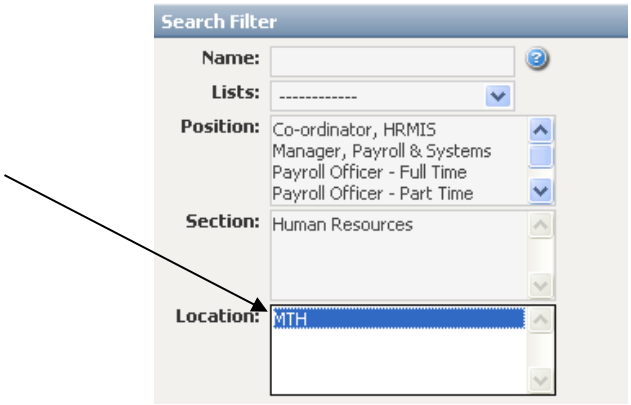
Searching staff by section

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)

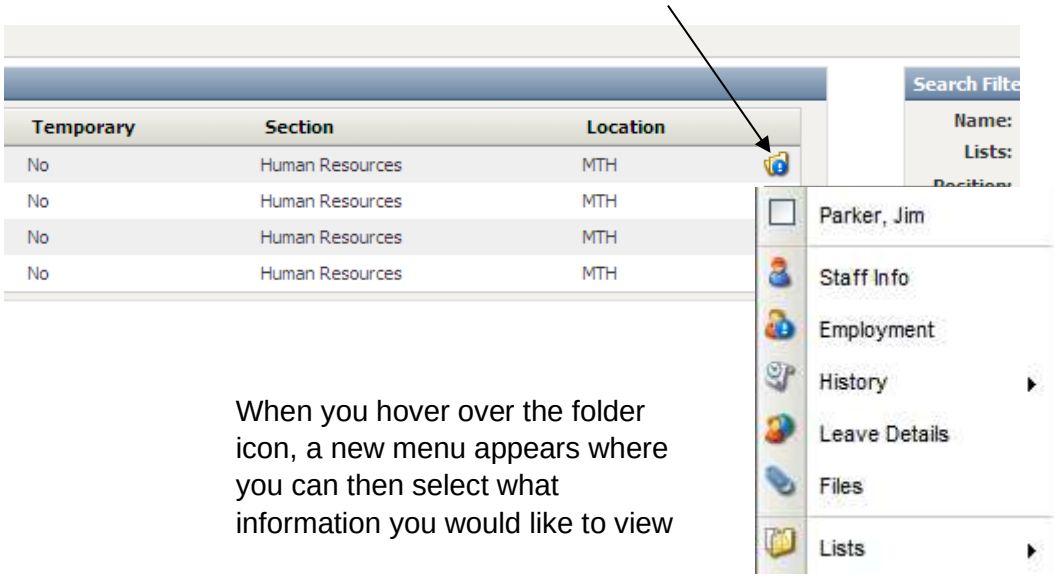


Searching staff by location

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



4. 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.



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

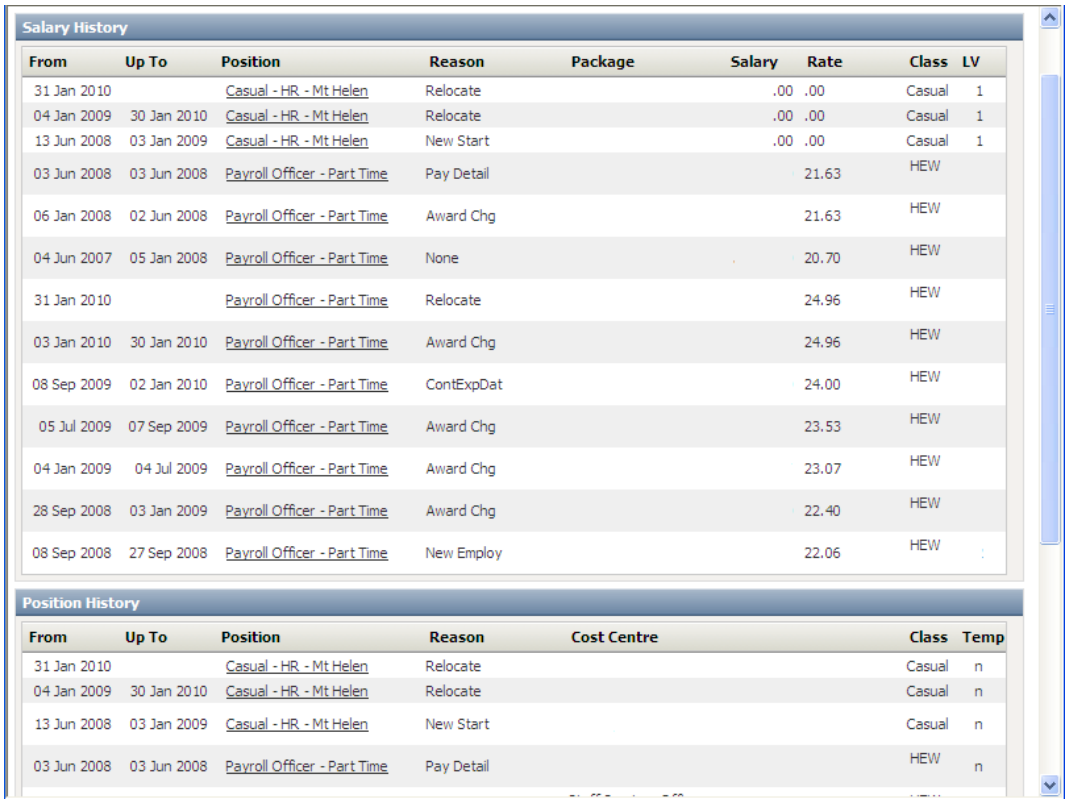
The Staff Information Screen will display Personal Information for the employee, and includes their address, telephone/mobile/work contact numbers, work email address and emergency contact information.

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.

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

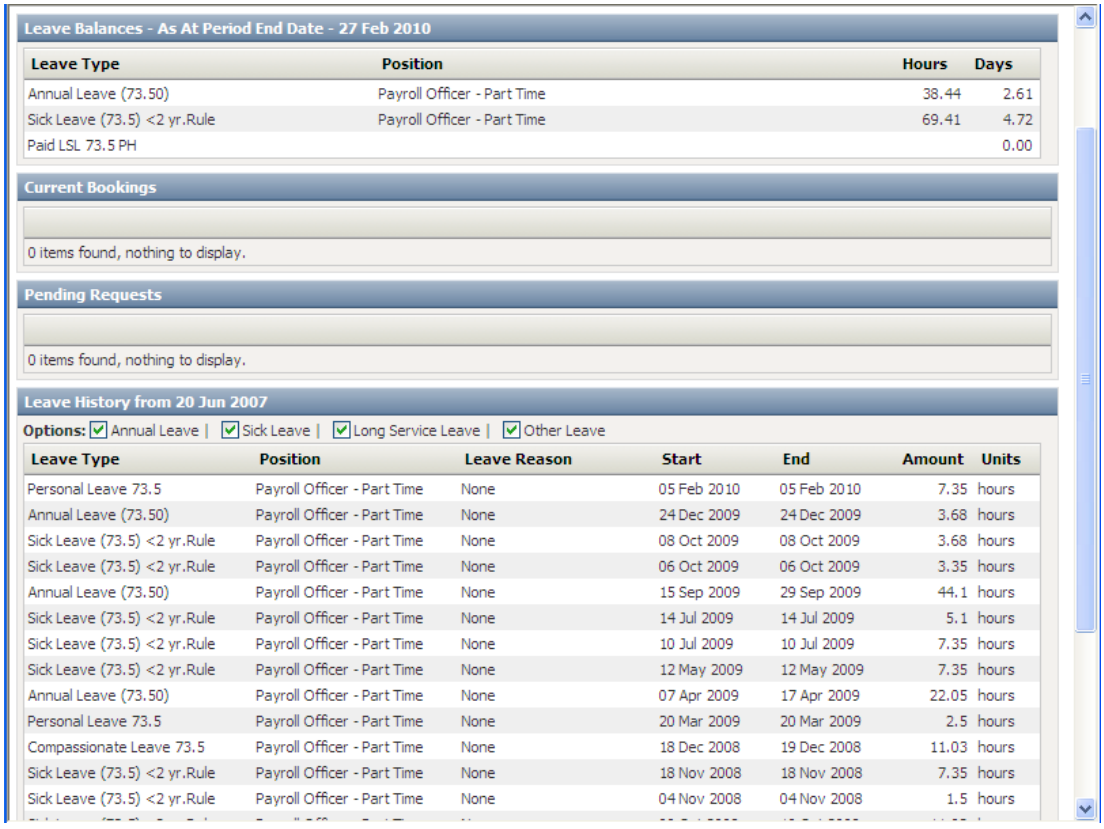
From	Up To	Position	Reason	Package	Salary	Rate	Class	LV
31 Jan 2010		Casual - HR - Mt Helen	Relocate		.00	.00	Casual	1
04 Jan 2009	30 Jan 2010	Casual - HR - Mt Helen	Relocate		.00	.00	Casual	1
13 Jun 2008	03 Jan 2009	Casual - HR - Mt Helen	New Start		.00	.00	Casual	1
03 Jun 2008	03 Jun 2008	Payroll Officer - 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: ☑ Annual Leave | ☑ Sick Leave | ☑ Long Service Leave | ☑ 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.

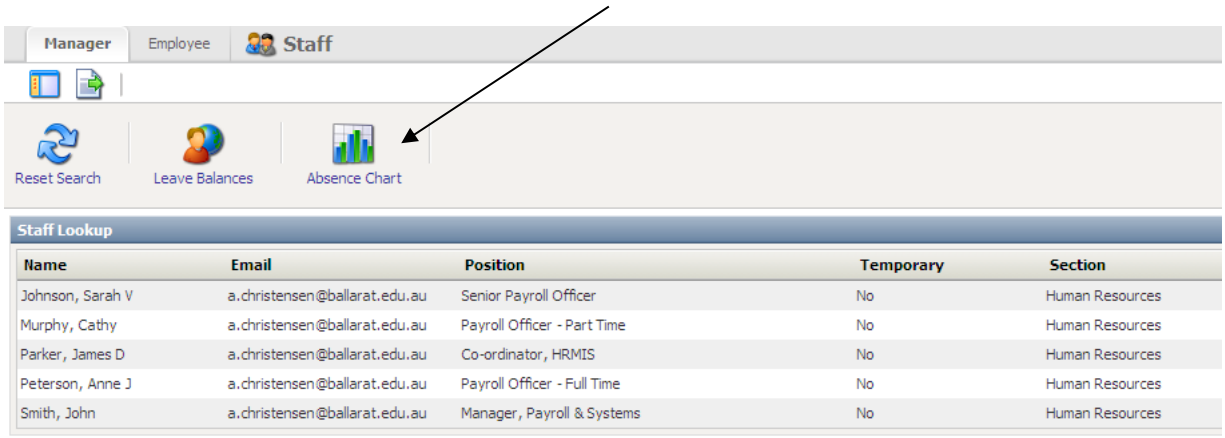
To open, click on the file name highlighted in blue.

Absence chart

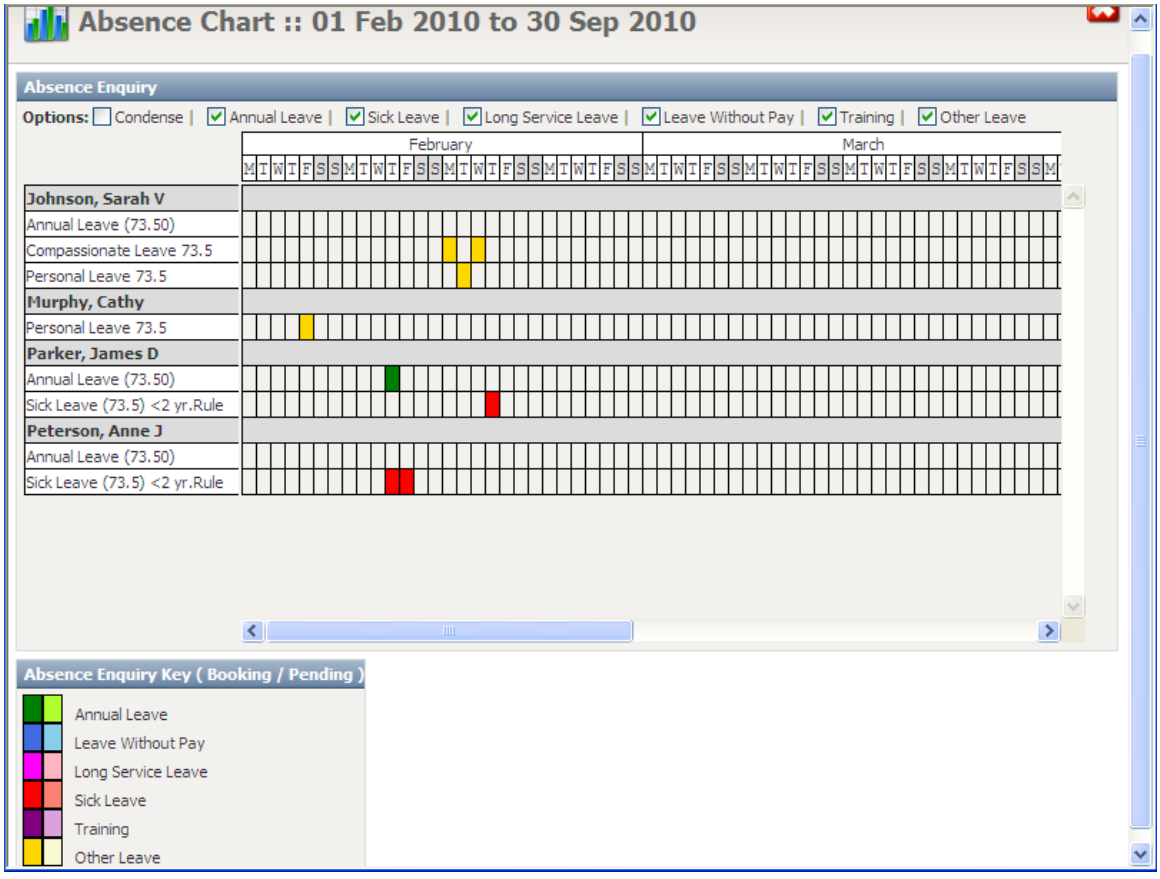
1. After selecting staff using the Search Filter (as discussed earlier) you can view pending/current leave bookings.

   This information is displayed on a Gannt 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.



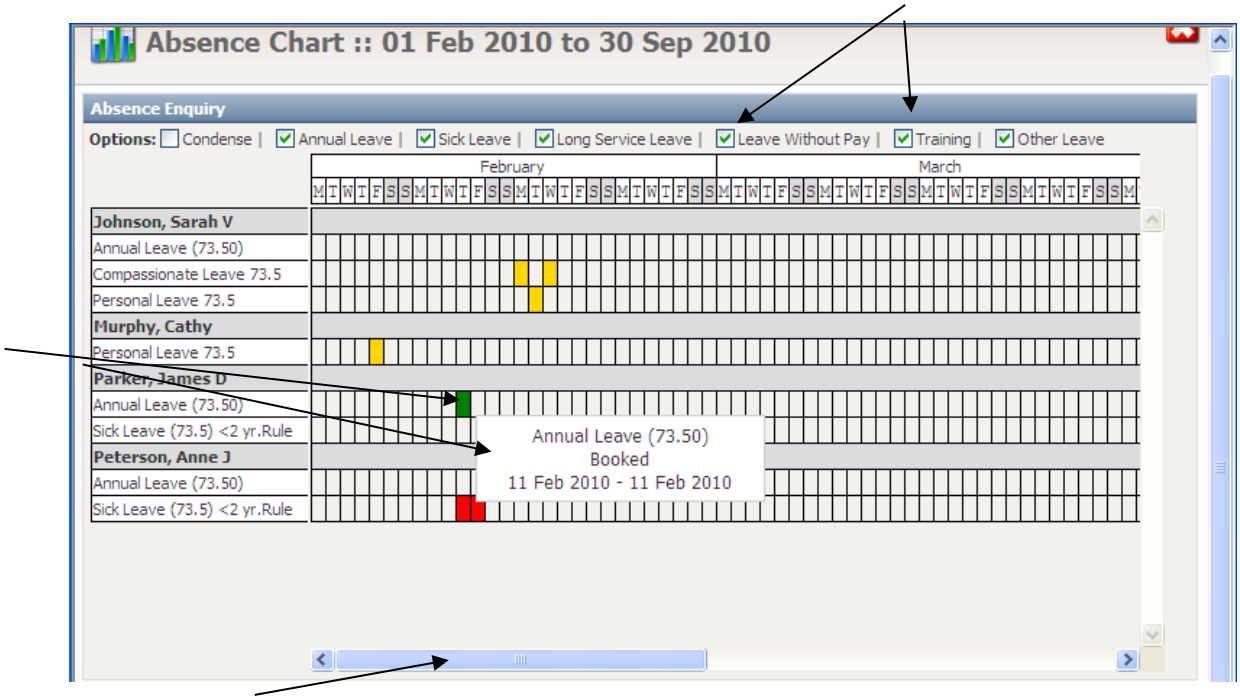
2. The following screen will display. As you can see for the month of February there are several leave bookings. In this example, James booked an Annual Leave day, both Sarah and Cathy booked 'Other' types of leave and both James and Anne had some sick days.



3. 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)

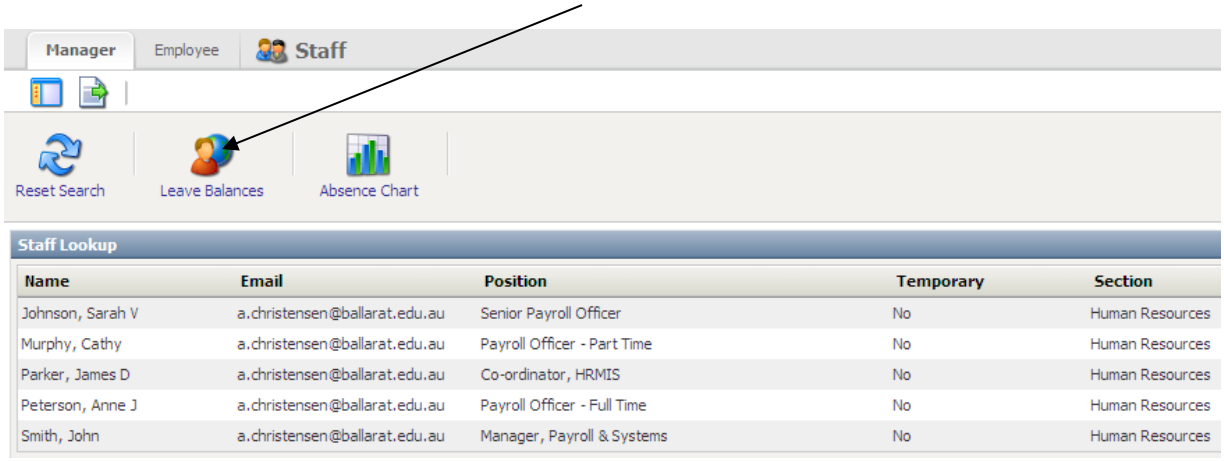
   You can filter the report to only display a particular type of leave by clicking on the checkboxes above the chart.



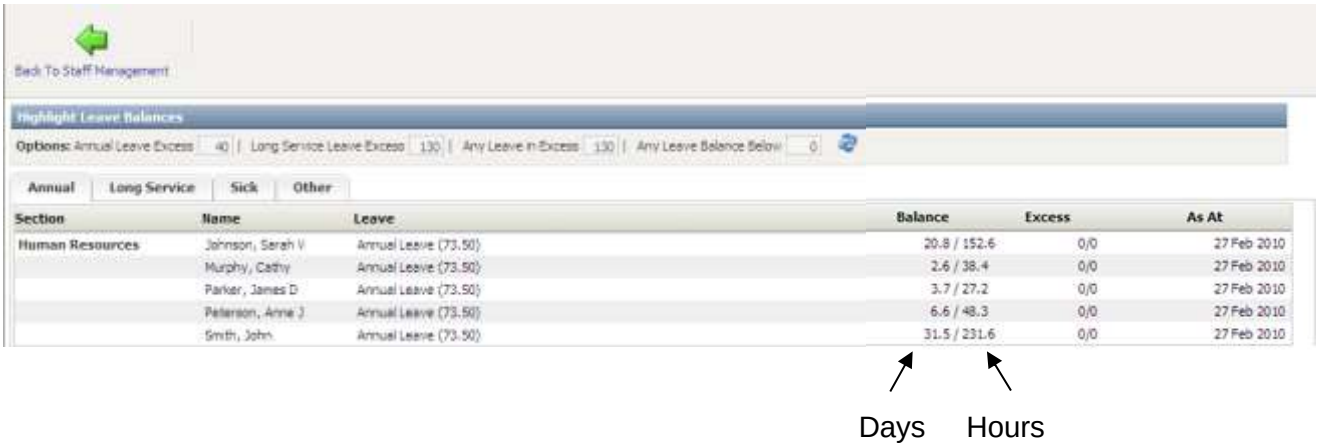
   Use the scroll bar to view future month leave bookings.

Displaying leave balances for selected staff

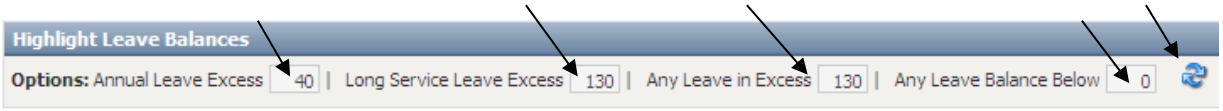
1. To access leave balances for all selected staff (see 'Searching for staff using Filters' as mentioned earlier) click on the 'Leave Balances' button.



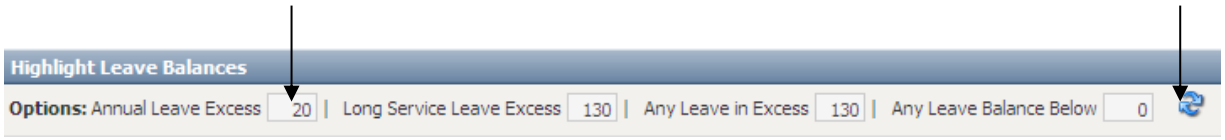
2. The following screen will appear. Supervisors/managers have the ability to view leave balances for their staff including annual, long service, personal and other types of leave. You can switch between the types of leave by clicking on the tabs. For the Balance column the system will display the balance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



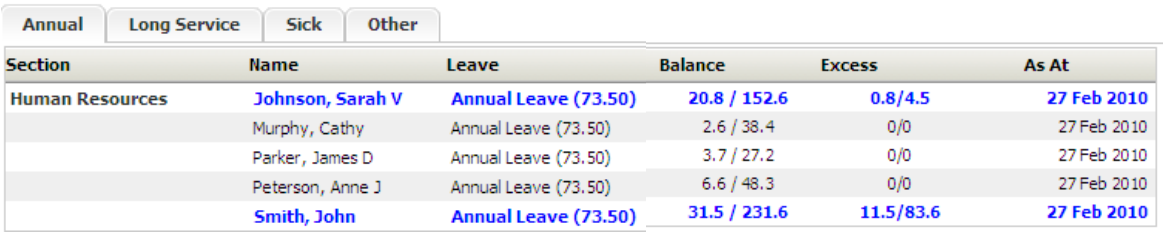
3. Another useful feature is the 'highlighting' of leave balances. This feature allows you to specify how many days of leave accrued by a staff member until it is considered 'excessive'. You can enter the amount of days until considered excessive into the fields provided and once this is done you must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



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.



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



Processing staff leave requests

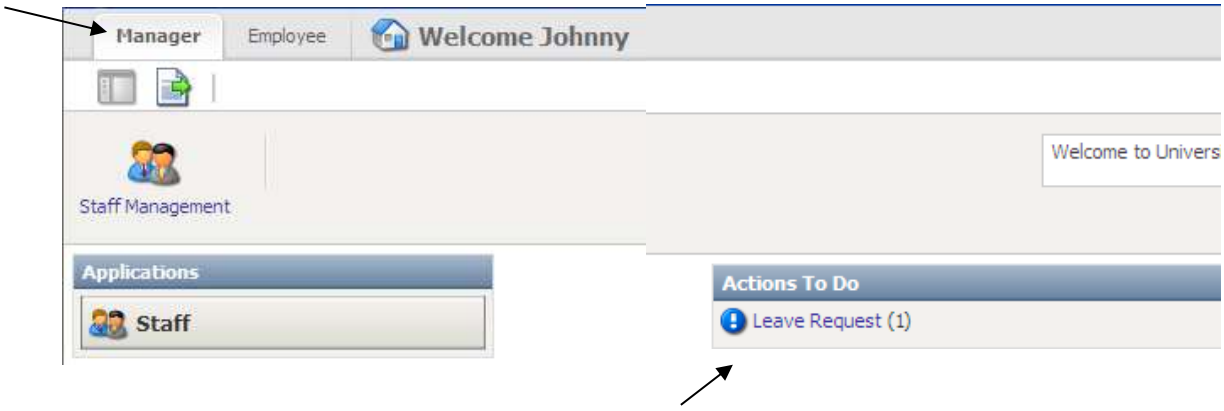
1. When a staff member requests leave the request is sent to their supervisor/manager for approval. An email is sent to the supervisor/manager's University email address. The subject line will read 'Leave Request' and the Sender will read 'EmpowerHR (please see below)

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.

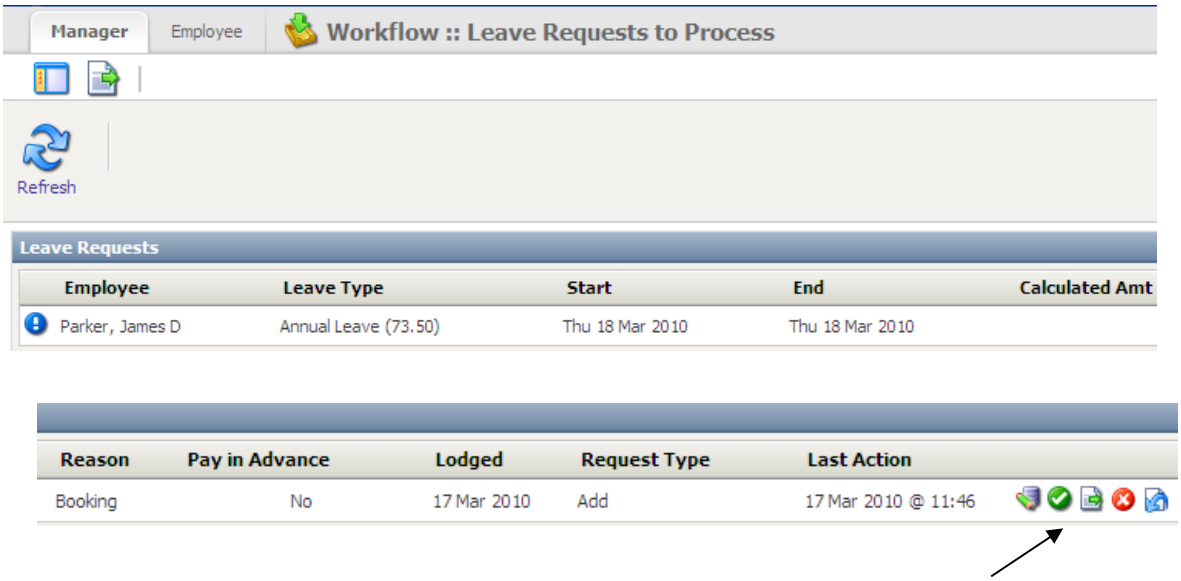
4. Once logged into the self-service system ensure you are using the 'manager' section (MSS) by clicking on the 'Manager' tab (as the system may default to 'Employee')



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)

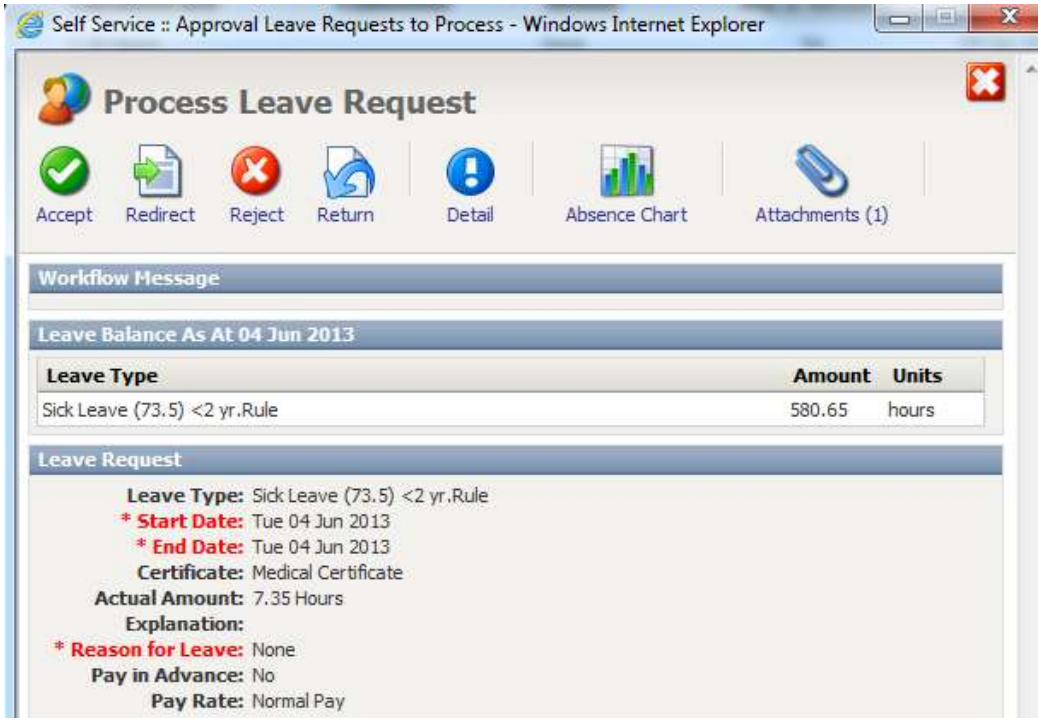


As expected, James' leave request has appeared for processing. You will also notice that on the end of the leave request record there are five options/buttons to choose from.

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

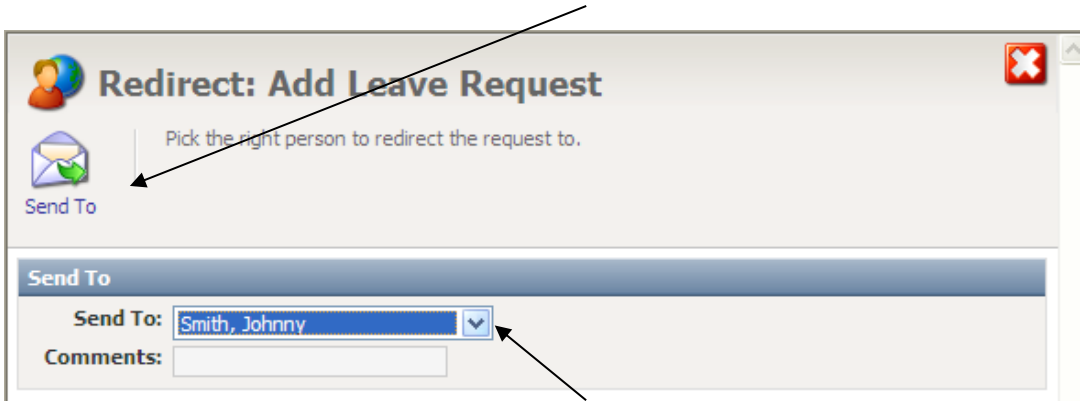
This button should be clicked if you are happy for the leave request to be approved. Once 'Accepted' an email will be sent to the staff member who made the request acknowledging that it has been approved and it has been passed on.

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

Once Payroll has approved, the leave request it will becomes 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.