

Employee Self-Service – (ESS) Operation Manual

Table of Contents

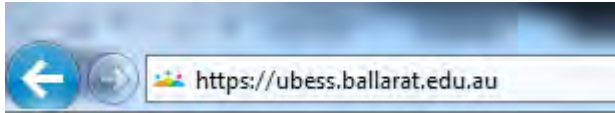
Employee Self-Service – (ESS) Operation Manual	1
Table of Contents	2
Logging into ESS	3
Changing Personal Details on ESS.....	5
Viewing Payslips & Payment Summaries.....	9
Viewing Employment History	14
Changing Payment Instructions on ESS (Changing Bank Payment Details)	15
Leave Bookings	21
Uploading Attachments to a Leave Request - Sick Leave Example	31
 Manager Self-Service – (MSS) Operation Manual	 42
Accessing MSS, Searching for Staff using Filters & Accessing Individual Staff Info	43
Absence Chart.....	50
Displaying Leave Balances for Selected Staff	52
Processing Staff Leave Requests	54

Logging into ESS

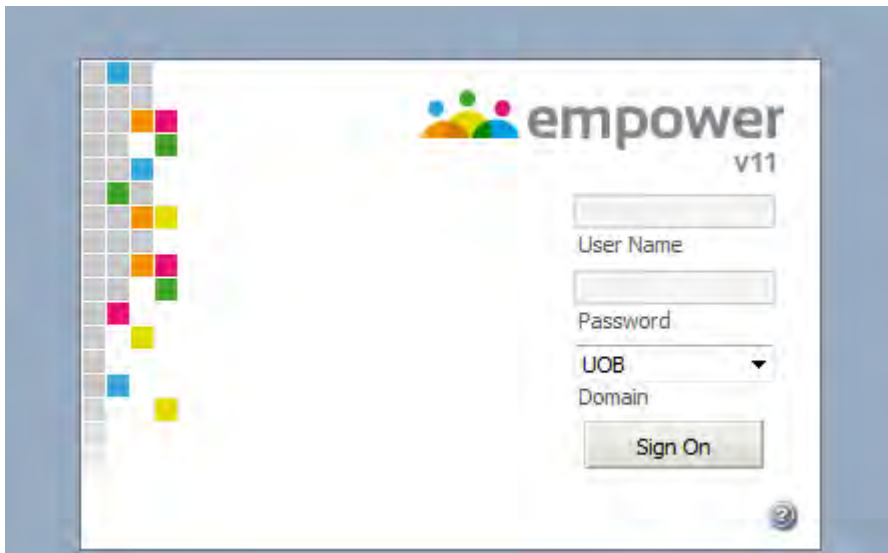
1. Open Internet Explorer



2. Type the following into the Address Bar, then hit Enter.
<https://ubess.ballarat.edu.au>



3. The following login screen will be displayed:



4. Login details will be as follows:

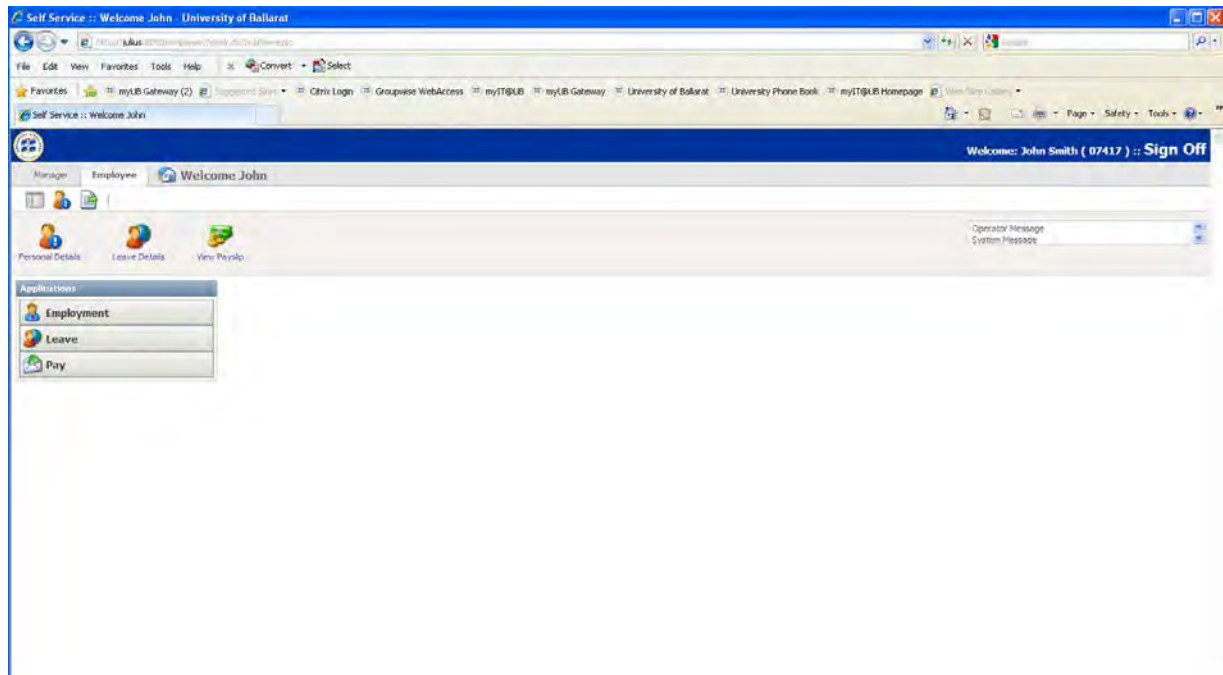
Username: Self-Service now makes use of the 'same sign-on' functionality. This is the same UB Network login credentials you use to log into the University network (also known as your 'Novell' login details) Your username is usually the first letter of your first name followed by your surname. This however, is not always the case so please contact the UB Servicedesk if you are unsure on 5327 9999 or send an email to servicedesk@ballarat.edu.au.

Password: This is the same as your UB Network password (Novell Password) If you require a password reset please contact the UB Servicedesk on 5327 9999 or send an email to servicedesk@ballarat.edu.au
Please note that you can no longer change your password via self-service.

Domain: This option cannot be changed. The Domain should read 'UOB' on the dropdown list.

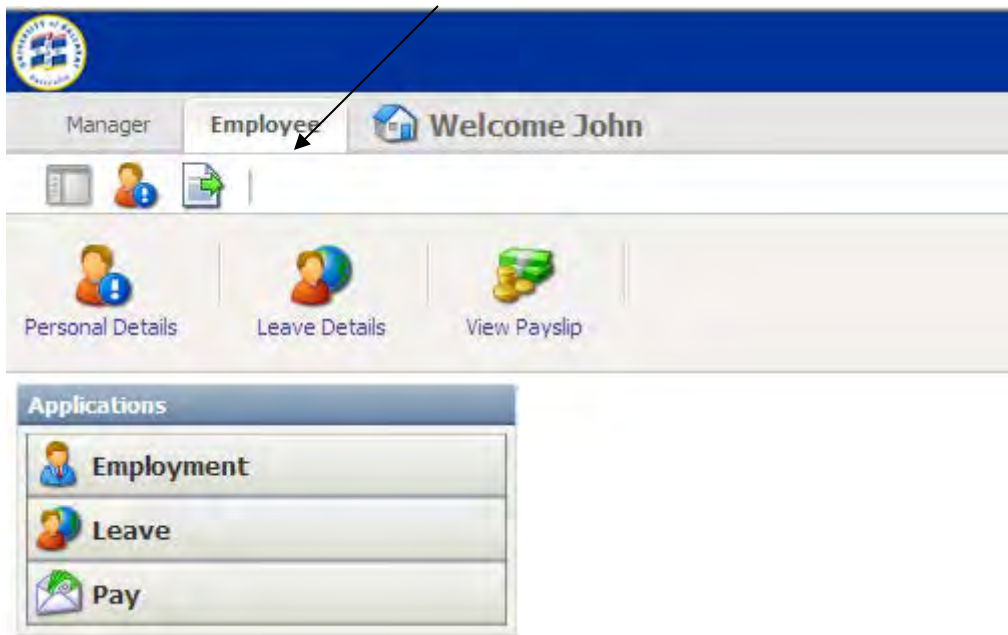
Click the 'Sign On' button after entering your login credentials

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

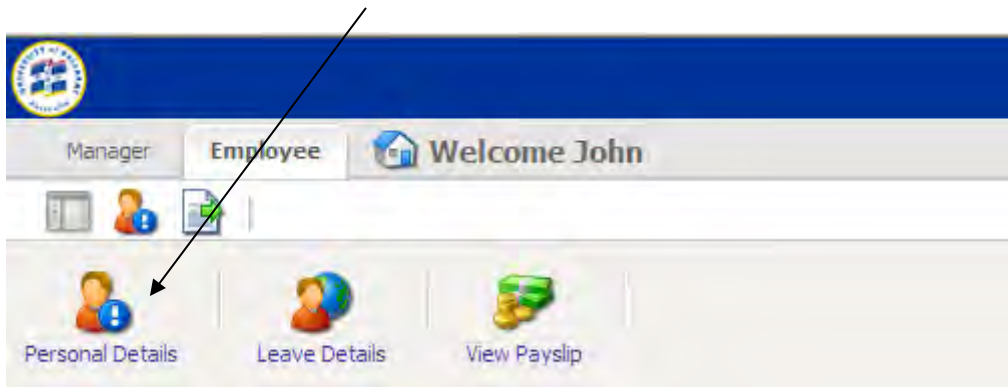


Changing Personal Details on ESS

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



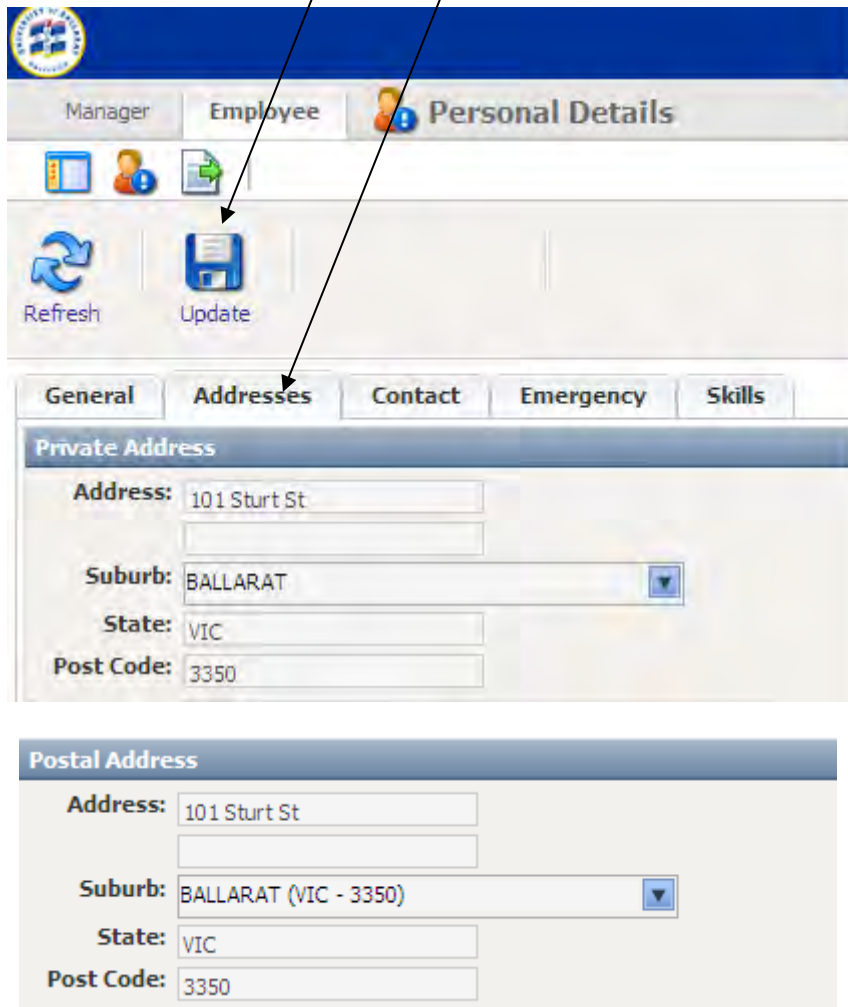
2. Now click on the 'Personal Details' button



- 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.

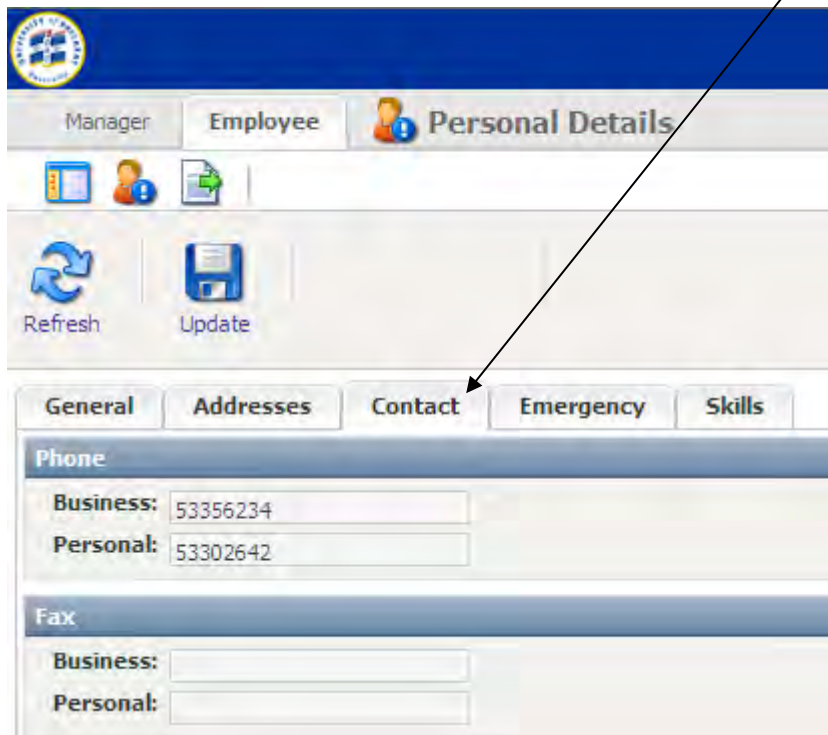
For example, by clicking on the 'Addresses' tab, you will be able to change your Private and Postal Address details.

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

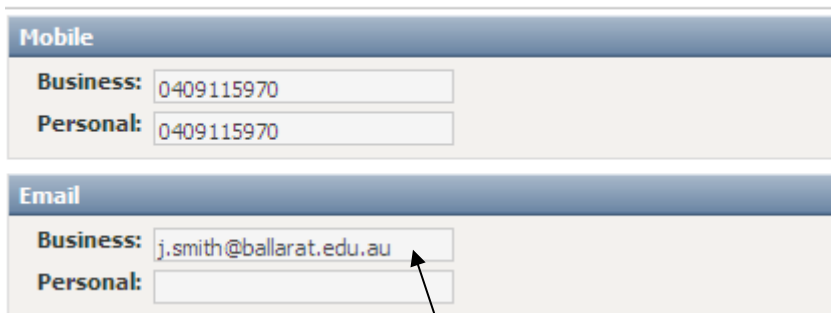


The screenshot shows a web application interface for 'Personal Details'. At the top, there are tabs for 'Manager', 'Employee', and 'Personal Details'. Below these are icons for 'Refresh' and 'Update'. The 'Addresses' tab is selected, showing two sections: 'Private Address' and 'Postal Address'. The 'Private Address' section has fields for 'Address' (101 Sturt St), 'Suburb' (BALLARAT), 'State' (VIC), and 'Post Code' (3350). The 'Postal Address' section has fields for 'Address' (101 Sturt St), 'Suburb' (BALLARAT (VIC - 3350)), 'State' (VIC), and 'Post Code' (3350). A red box highlights the 'Update' button, with an arrow pointing to it from the text above.

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 the 'Personal Details' form with the 'Contact' tab selected. The form has a blue header with the University of Ballarat logo and navigation tabs for 'Manager', 'Employee', and 'Personal Details'. Below the header are icons for 'Refresh' and 'Update'. The 'Contact' tab is active, showing sections for 'Phone' and 'Fax'. The 'Phone' section has fields for 'Business' (53356234) and 'Personal' (53302642). The 'Fax' section has empty fields for 'Business' and 'Personal'. An arrow points from the 'Update' button in the header to the 'Contact' tab.



This close-up shows the 'Mobile' and 'Email' sections of the form. The 'Mobile' section has fields for 'Business' (0409115970) and 'Personal' (0409115970). The 'Email' section has fields for 'Business' (j.smith@ballarat.edu.au) and 'Personal' (empty). An arrow points from the 'Business' email field to the 'Update' button in the previous screenshot.

It is important to have the Business email field populated with your 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 a disaster occurring. (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 2 Emergency contacts to be entered.

The screenshot shows the 'Personal Details' page in the ESS system. The 'Emergency' tab is selected. The form contains the following fields:

Emergency Contact	
Name:	Jim Smith
Relationship:	Father
Address:	
Post Code:	
Country:	

Phone	
Personal:	
Business:	

Mobile	
Personal:	0449452334

The second screenshot shows the 'Emergency Contact #2' form, which is identical in structure to the first one but for the second contact.

Emergency Contact #2	
Name:	Jill Smith
Relationship:	Mother
Address:	
Post Code:	
Country:	

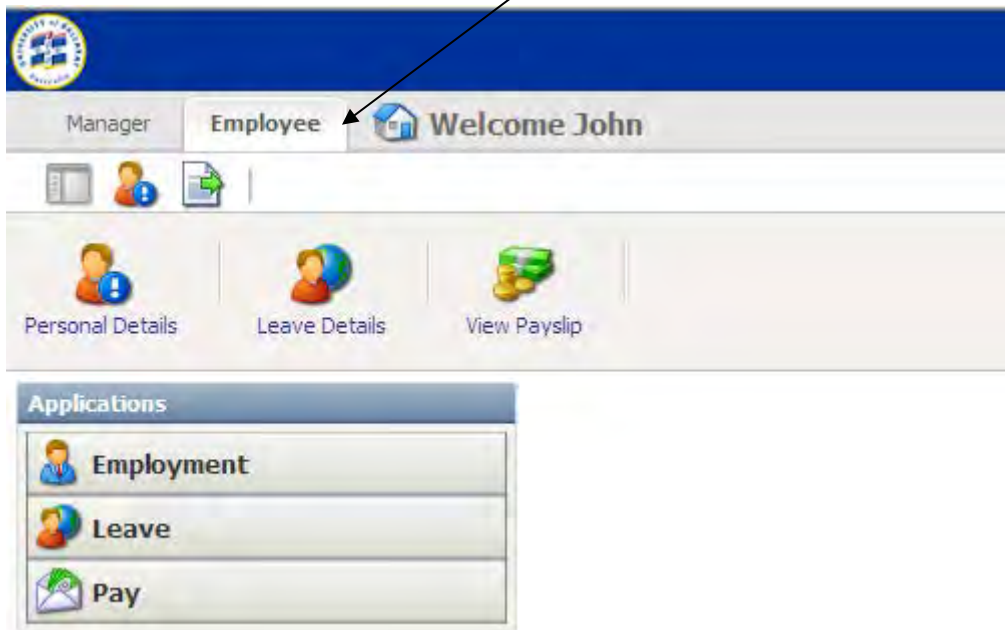
Phone #2	
Personal:	
Business:	

Mobile #2	
Personal:	0443221456

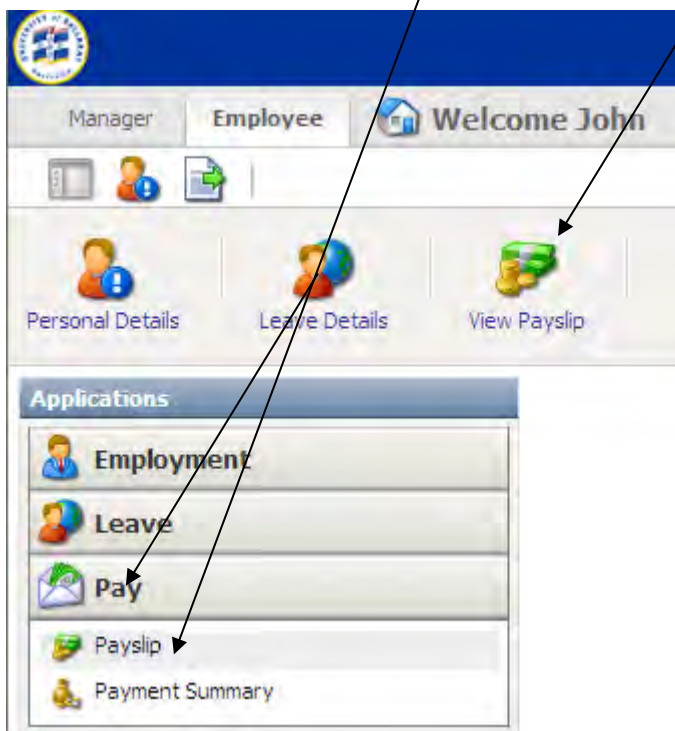
Viewing Payslips & Payment Summaries

ESS allows the user to easily access their Payslips and Payment Summaries. 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. Now you can access payslips in two ways. You can simply click on the 'View Payslip' button OR Click on the 'Pay' button then click on the 'Payslip' button which appears underneath.



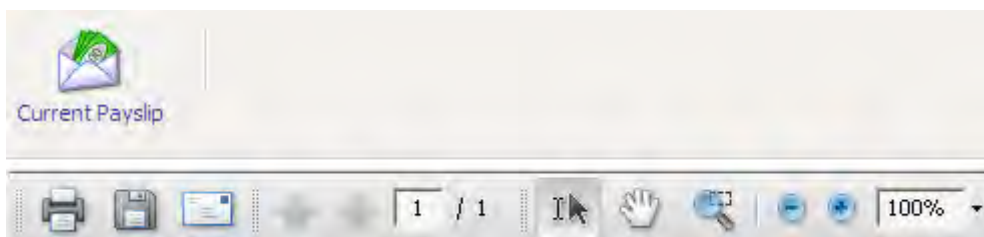
- By default your latest (current) payslip will appear on screen. (see below)




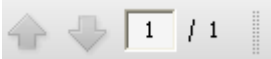

Pay Advice Smith, John

Pay Period 17 Jan 2010 to 30 Jan 2010 Paid 28 Jan 2010

Payments	Hours	Rate	Amount	
Normal Pay	73.50	34.04	2502.26	
			Amount	YTD
Deductions and Tax			720.00	11350.00
Computer Generated Tax				36.00
Staff Club				
			Amount	YTD
Benefits			350.32	4912.66
UniSuper SG 14%			75.07	1052.72
UniSuper SG 3%				
Title	Class/Level	Salary	Salary Package	Conditions
Casual Info Services	Casual / 1			c
- Mt Hele				SLS IS C&S
Super Fund	Fund Phone	Fund Member Number		
UniSuper				
Summary		This Pay	Year to Date	Disbursement
Gross Pay	2502.26	40160.20		Reference
Pre Tax Dedns	0.00	0.00		Amount
Gross Taxable	2502.26	40160.20		1782.26
Post Tax Dedns	0.00	36.00		

- You will notice there are several options available to you on the toolbar above the payslip



- The first option allows you to print the payslip straight to an installed printer of your choosing. (Click on the picture of a Printer) 
- You can also save a copy of the payslip in 'pdf' format (Adobe Acrobat Reader must be installed on your computer to be able to view the saved document) Click on the Disk button and select the location to install to. 
- You can also email a copy of the payslip to yourself or another email address. (Outlook should load up by default and attach the pdf document) 
- You can cycle through pages of the document using the arrow buttons however, there is usually only 1 page to view. 
- You may also need to zoom in and out of the document by using the magnification Buttons. A magnification percentage can also be typed into the field provided. 

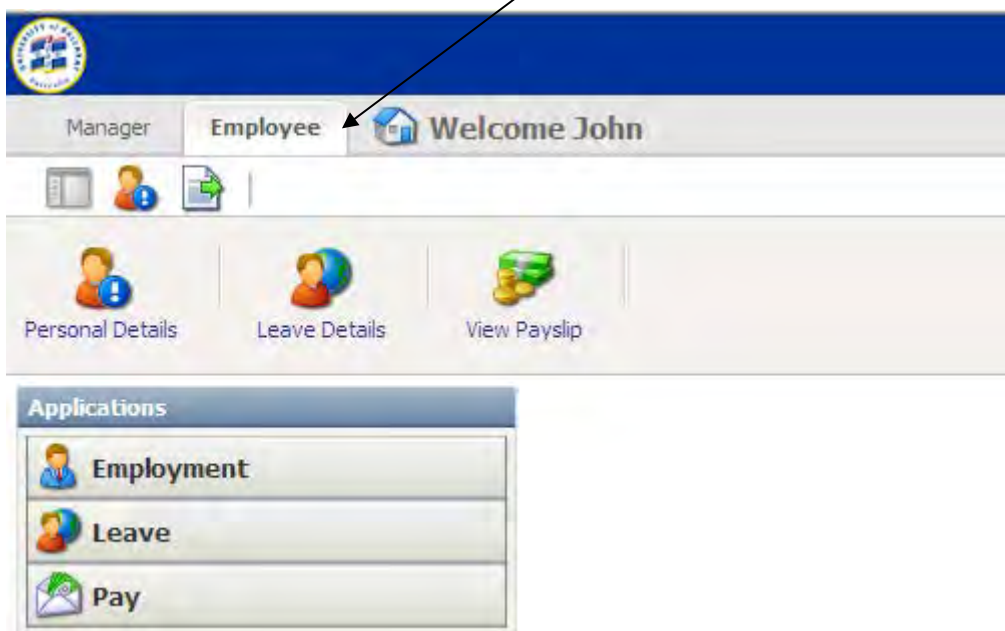
5. The following appears to the right of the payslip window. This is where you can view past payslips by clicking on the Year, Month and Pay Date.



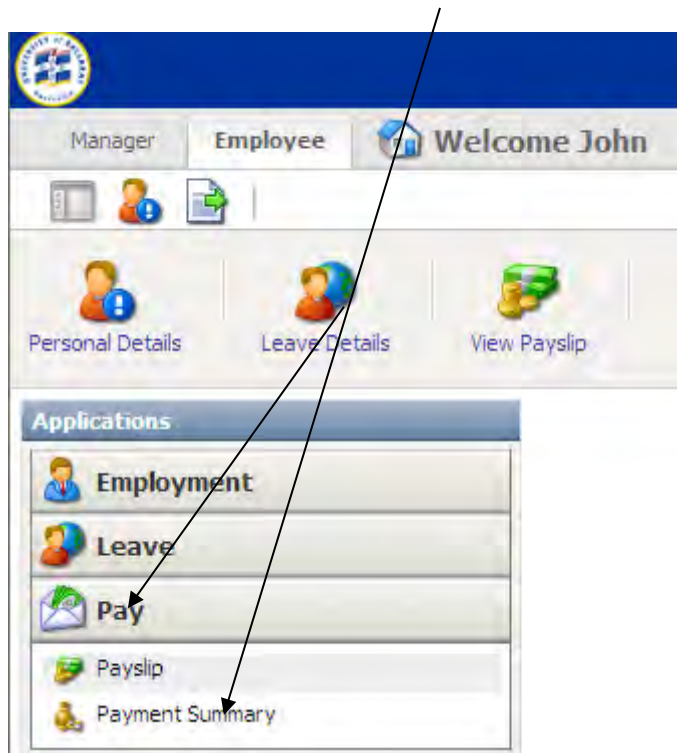
If you do not see a payslip appearing at all on screen it may be because you don't have The Adobe Acrobat browser plugin installed. If necessary, click on the link provided to install it.

Similar to accessing Payslips, staff can also access Payment Summaries via ESS.

6. To access Payment Summaries click on the 'Employee' Tab as seen below:



7. Now click on the 'Pay' button then click on the 'Payment Summary' button which appears underneath.



8. The latest payment summary will appear on screen. (see below)

43.1% Collaborate Sign Find

PAYG Payment Summary - Individual Non Business

Payment summary for year ending 30 June 2009

Payee details

Period of payment: 01/07/2008 to 30/06/2009

Payee's tax file number: []

NOTICE TO PAYEE

If this payment summary shows an amount in the total tax withheld box you must lodge a tax return. If no tax was withheld you may still have to lodge a tax return. For more information on whether you have to lodge, or about this payment summary and how it is taxed, you can refer to TaxPack, phone 13 20 61 between 9.00am and 6.00pm (EST), Monday to Friday, or visit www.ato.gov.au

Gross Payments

Gross Payments: \$ 53404

ODRP Payments: \$ []

Other Income: \$ []

Reportable fringe benefits amount (FY 2008/09) (1 April to 31 March): \$ []

Allowances

Allowances shown here are not included in Gross payments above. The amount(s) must be shown separately in your tax return.

Total: \$ 0

Deductions

Workplace Giving: \$ 0

Lump Sum Payments

A: \$ []

D: \$ []

D: \$ []

E: \$ []

Payer details

Payer's ABN or withholding payer number: [] Branch number: []

Payer's name: University of Ballarat

Signature of Authorised Person: [] Date: 16/02/2010

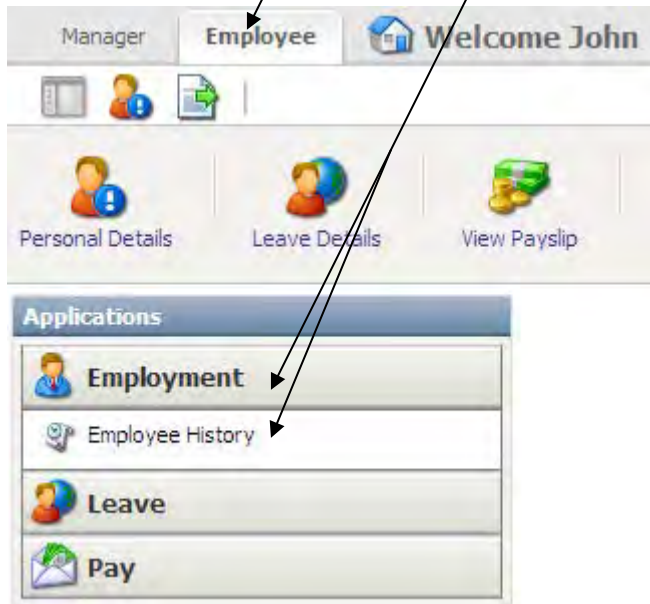
9.. You can save, print and view the payment summary the same way as your payslips.
(Please refer to step 4 & 5 above which explains the tool bar)

Similar to the payslip, you are able to access payment summaries from previous years. The following screen appears to the right of the payment summary window.



Viewing Employment History

1. ESS is also very useful for displaying Employment history for staff within the University. To access your employment history at UB click on the Employee tab, click on the Employment button, then select 'Employee History'

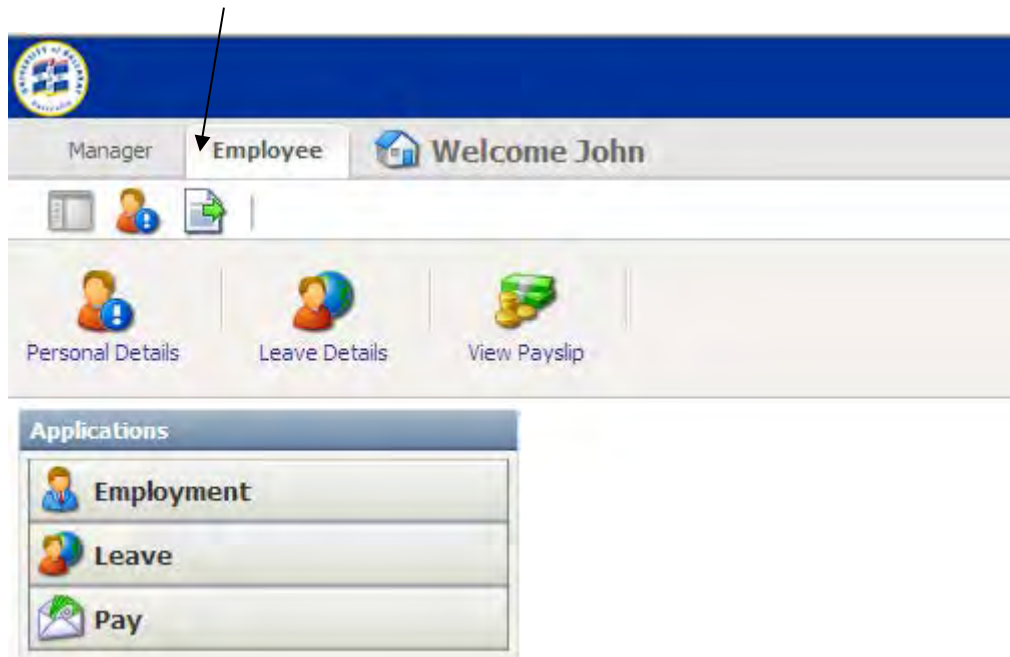


2. The following screen will appear which displays all positions held within UB, including salary classifications, pay increases, pay rates, increment changes, reasons for changes and start & end dates. This information is split into two sections 'Salary History' and 'Position History'. This data cannot be changed by the user.

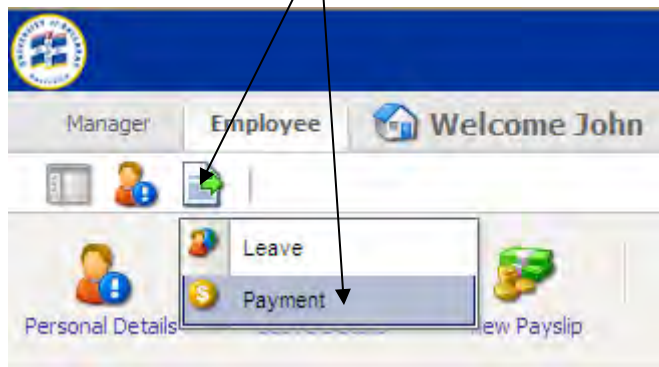
Salary History									
From	Up To	Position	Reason	Package	Salary	Rate	Class	LV	
04 Jan 2009		Casual Info Services - Mt Helen	Relocate		.00	.00	Casual	1	
15 Apr 2007	03 Jan 2009		None		.00	.00	Casual	1	
27 Feb 2006	14 Apr 2007	Casual Info Services - Mt Helen	New Start		.00	.00	Casual	1	
03 Jan 2010			Award Chg		65282.00	34.04	HEW/7	2	
01 Oct 2009	02 Jan 2010		Transfer		62771.00	32.73	HEW/7	2	
05 Jul 2009	30 Sep 2009		Award Chg		50021.00	26.09	HEW/5	3	
11 Jun 2009	04 Jul 2009		salary inc		49040.00	25.57	HEW/5	3	
01 Jun 2009	10 Jun 2009		Transfer		48077.00	25.07	HEW/5	2	
17 Mar 2009	31 May 2009		ContExpDat		60334.00	31.46	HEW/7	1	
04 Jan 2009	16 Mar 2009		Award Chg		60334.00	31.46	HEW/7	1	
01 Jan 2009	03 Jan 2009		Conditions		58577.00	30.55	HEW/7	1	
Position History									
From	Up To	Position	Reason	Cost Centre	Class	Temp			
04 Jan 2009		Casual Info Services - Mt Helen	Relocate		Casual	n			
15 Apr 2007	03 Jan 2009	Casual Info Services - Mt Helen	None	Info Tech Serv - Admin Cas	Casual	n			
27 Feb 2006	14 Apr 2007	Casual Info Services - Mt Helen	New Start	Info Tech Serv - Admin Cas	Casual	n			
03 Jan 2010			Award Chg		HEW/7	n			
01 Oct 2009	02 Jan 2010		Transfer		HEW/7	n			
05 Jul 2009	30 Sep 2009		Award Chg		HEW/5	n			
11 Jun 2009	04 Jul 2009		salary inc		HEW/5	n			
01 Jun 2009	10 Jun 2009		Transfer		HEW/5	n			
17 Mar 2009	31 May 2009		ContExpDat		HEW/7	n			
04 Jan 2009	16 Mar 2009		Award Chg		HEW/7	n			

Changing Payment Instructions on ESS (Changing Bank Payment Details)

1. ESS users also have the ability to change their banking details. To do this click on the Employee tab.



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

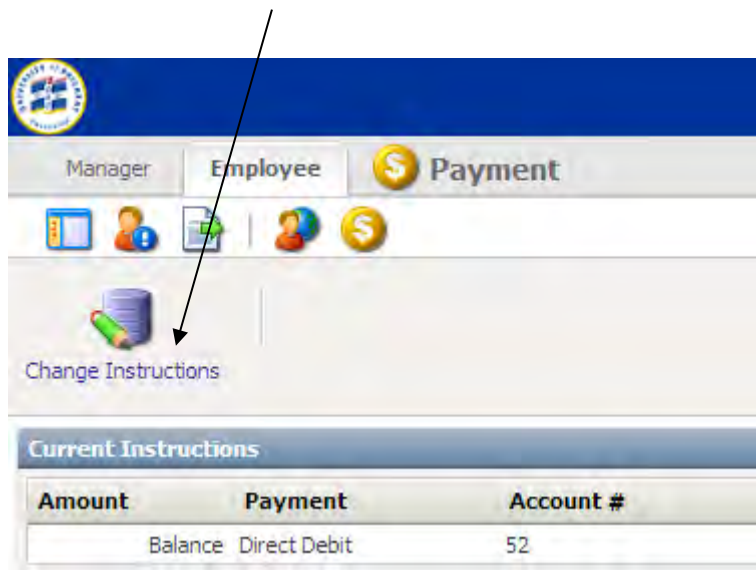


3. The following screen will appear, listing your current payment instructions.

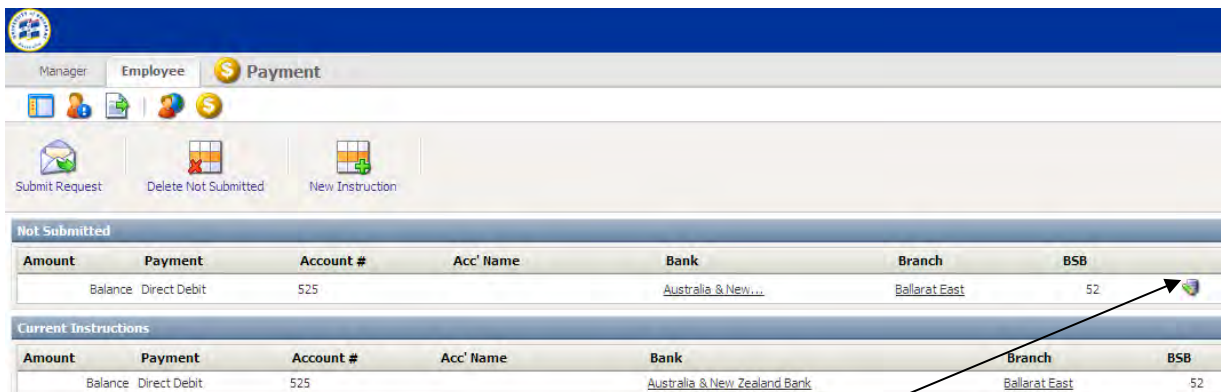
This screenshot shows the ESS interface with the 'Payment' tab selected. The 'Change Instructions' link is visible. Below it, the 'Current Instructions' table is displayed.

Amount	Payment	Account #	Acc' Name	Bank	Branch	BSB
Balance	Direct Debit	52		Australia & New Zealand Bank	Ballarat East	01 -52

4. Click on 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)



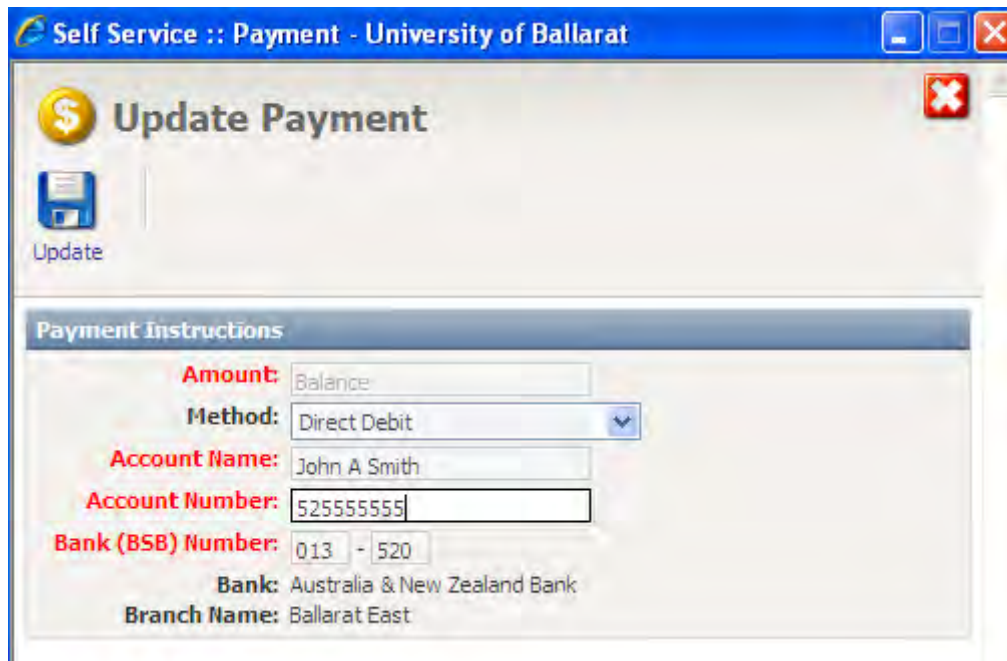
5. You will be presented with the following screen. Please note that by default the 'Not Submitted' and the 'Current Instructions' are the same payment instruction. The 'Not Submitted' instruction appears so you are able to Change your payment details without having to delete all details then start all over again.



6. To change/amend your current payment instruction please click on the 'Change' button 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.



Self Service :: Payment - University of Ballarat

Update Payment

Update

Payment Instructions

Amount: Balance

Method: Direct Debit

Account Name: John A Smith

Account Number: 52555555

Bank (BSB) Number: 013 - 520

Bank: Australia & New Zealand Bank


Branch Name: Ballarat East

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 is two more steps you will need to complete before the changes you made will come into effect.


Submit Request


Delete Not Submitted


New Instruction


Successfully updated instruction details

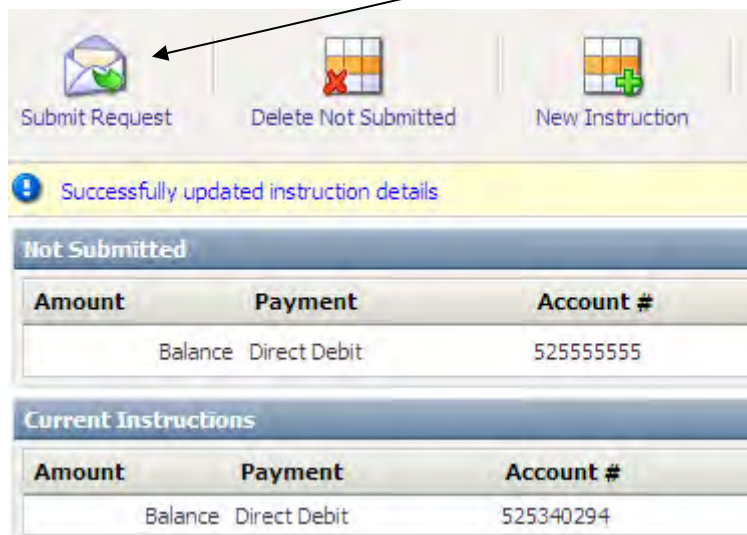
Not Submitted

Amount	Payment	Account #	Acc' Name	Bank	Branch	BSB
Balance	Direct Debit	52555555	John A Smith	Australia & New...	Ballarat East	013-520

Current Instructions

Amount	Payment	Account #	Acc' Name	Bank	Branch	BSB
Balance	Direct Debit	525		Australia & New Zealand Bank	Ballarat East	52

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

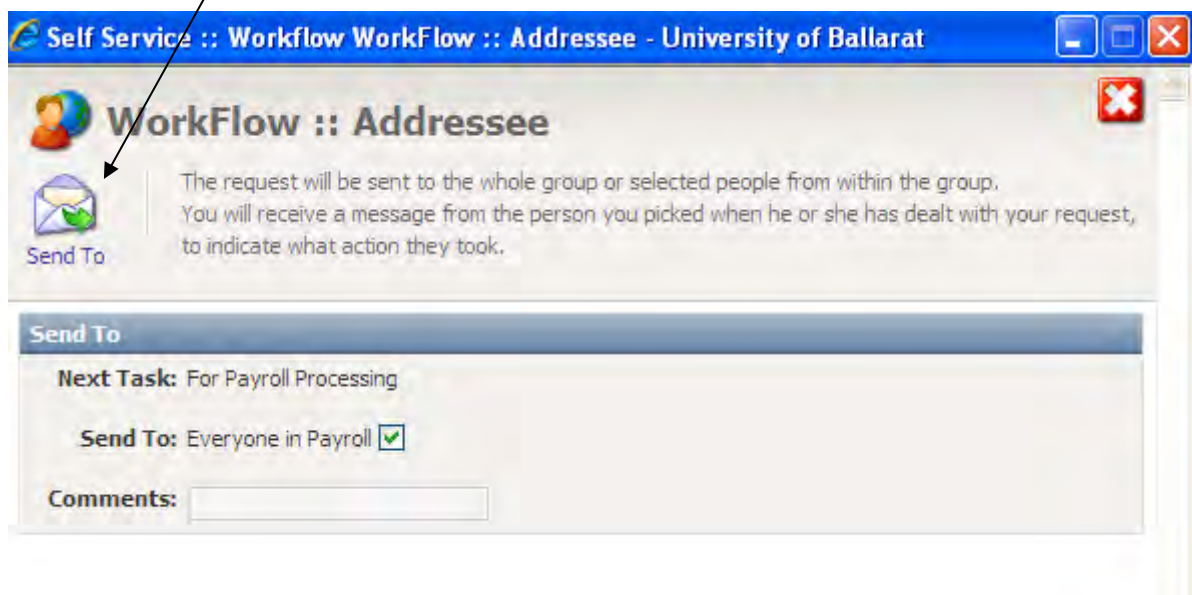


The screenshot shows a web interface with three buttons at the top: 'Submit Request' (with an envelope icon), 'Delete Not Submitted' (with a grid icon and a red X), and 'New Instruction' (with a grid icon and a green plus). An arrow points to the 'Submit Request' button. Below the buttons is a yellow notification bar that says 'Successfully updated instruction details'. Underneath are two tables. The first table is titled 'Not Submitted' and has columns 'Amount', 'Payment', and 'Account #'. It contains one row with 'Balance', 'Direct Debit', and '52555555'. The second table is titled 'Current Instructions' and has the same columns. It contains one row with 'Balance', 'Direct Debit', and '525340294'.

Amount	Payment	Account #
Balance	Direct Debit	52555555

Amount	Payment	Account #
Balance	Direct Debit	525340294

10. Now by clicking on the 'Send To' button on the screen below, the new bank details will be sent to Payroll for approval. Once the Payroll team approve/confirm the new payment instructions you submitted, the new details will come into effect and an email will be sent to you once processed on the system.



The screenshot shows a web interface titled 'Self Service :: Workflow WorkFlow :: Addressee - University of Ballarat'. Below the title bar is a section titled 'WorkFlow :: Addressee' with a 'Send To' button (envelope icon). An arrow points to the 'Send To' button. To the right of the button is a text box that says: 'The request will be sent to the whole group or selected people from within the group. 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.' Below this is a form titled 'Send To'. It has a 'Next Task' field with the value 'For Payroll Processing'. It has a 'Send To' field with the value 'Everyone in Payroll' and a checked checkbox. It has a 'Comments' field with a text input box.

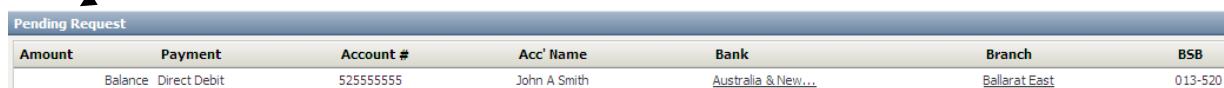
Send To

Next Task: For Payroll Processing

Send To: Everyone in Payroll ☒

Comments:

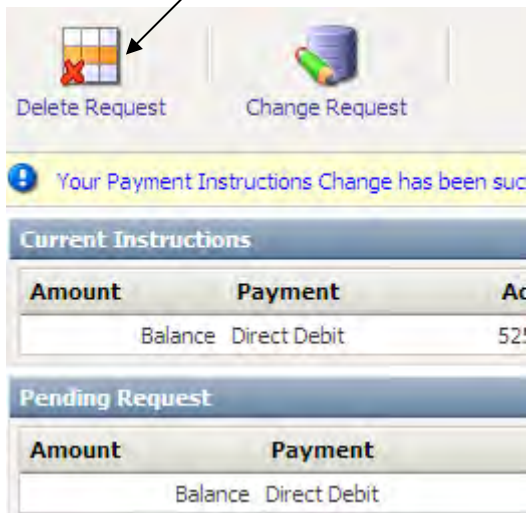
11. You will notice that the 'Not Submitted' record will now read as a 'Pending Request' until the new payment instructions are approved by payroll.



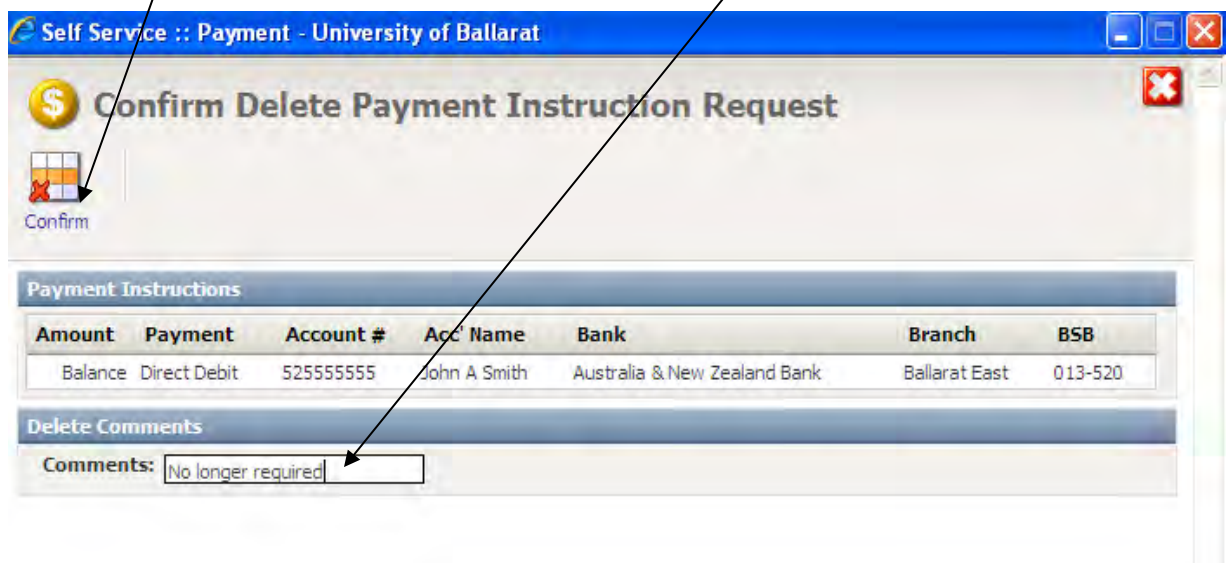
The screenshot shows a table titled 'Pending Request'. It has columns: 'Amount', 'Payment', 'Account #', 'Acc' Name', 'Bank', 'Branch', and 'BSB'. It contains one row with the following values: 'Balance', 'Direct Debit', '52555555', 'John A Smith', 'Australia & New...', 'Ballarat East', and '013-520'.

Amount	Payment	Account #	Acc' Name	Bank	Branch	BSB
Balance	Direct Debit	52555555	John A Smith	Australia & New...	Ballarat East	013-520

12. If you no longer want the pending request to be approved or processed you can click on the 'Delete Request' button. (assuming payroll haven't already approved the requested payment instruction)

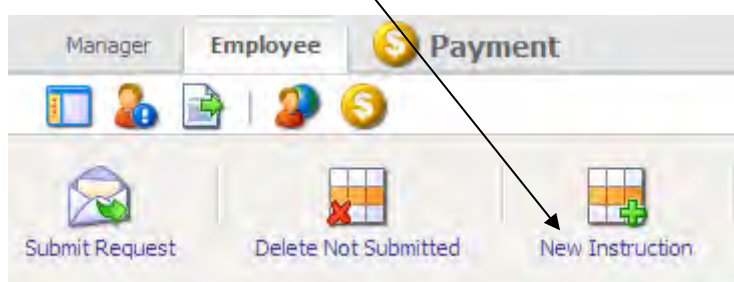


13. Click on the 'Confirm' button to confirm that you want to delete the request you made. Note that you can also type in a comment on the 'Comments' field explaining why you no longer want the changes to go ahead. (This is optional)



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 please do the following:

Click on 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 completed entering your details, click on the 'Save' button.

The screenshot shows a web application window titled "Self Service :: Payment - University of Ballarat". The main heading is "Add Payment" with a dollar sign icon. Below the heading is a "Save" button with a floppy disk icon. The "Payment Instructions" section contains the following fields:

- Amount:** 50.00
- Method:** Direct Debit (dropdown menu)
- Account Name:** John Smith
- Account Number:** 596666666
- Bank (BSB) Number:** 013 - 520
- Bank:** Australia & New Zealand Bank
- Branch Name:** Ballarat East

16. Now click on the 'Submit Request' button.



17. Now by clicking on the 'Send To' button on the screen below, the new bank instructions will be sent to Payroll for approval. Once the Payroll team approve/confirm the new payment instructions you submitted, the new details will come into effect and an email will be sent to you once processed on the system.

The screenshot shows a web application window titled "Self Service :: Workflow WorkFlow :: Addressee - University of Ballarat". The main heading is "Workflow :: Addressee" with a person icon. Below the heading is a "Send To" button with an envelope icon. The text below the button reads: "The request will be sent to the whole group or selected people from within the group. 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." Below this text is a "Send To" section with the following fields:

- Next Task:** For Payroll Processing
- Send To:** Everyone in Payroll ☒
- Comments:** (text input field)

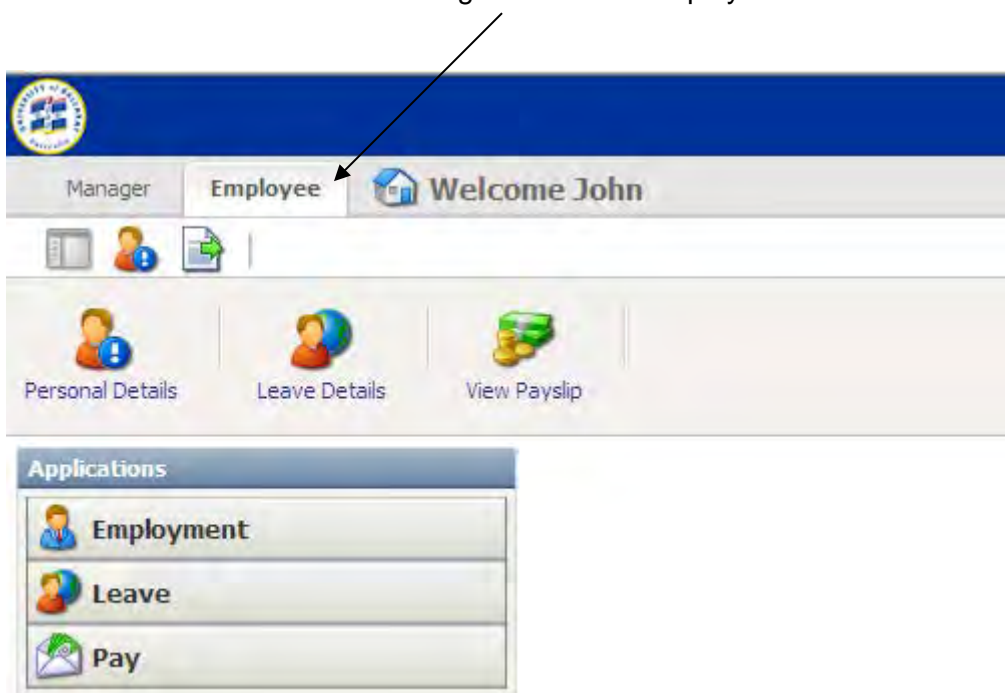
Leave Bookings

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 Sick Leave, Annual Leave, Compassionate Leave, Paternity Leave, Personal Leave, Special Leave (TAFE Teachers) and UB Business/Travel. Please note that for all other types of leave (Leave without Pay, Maternity Leave, Work Cover Leave and Long Service Leave) are all unavailable in Self-Service. Please continue using the existing paper-based forms for these types of leave.

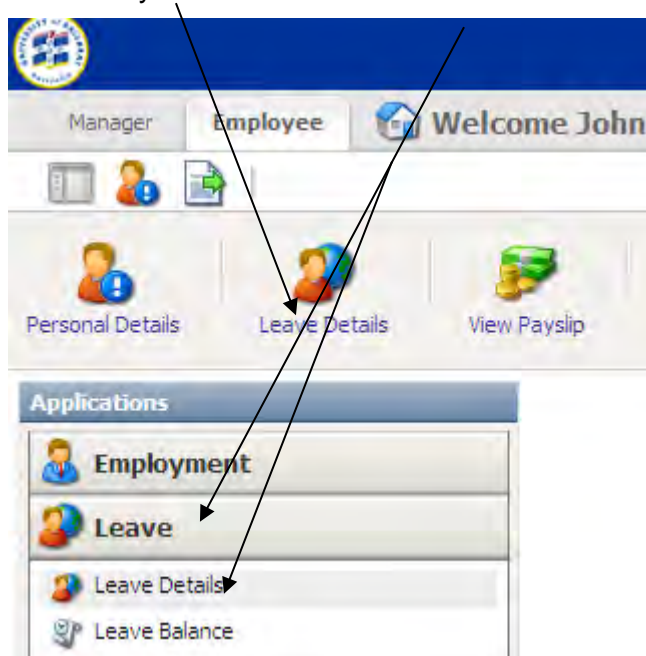
In the example below an Annual Leave booking will be demonstrated. Please note that all types of leave are booked in the same way apart from selecting the different 'type' of leave from the dropdown menu.

Booking Annual Leave Example

1. To make an Annual Leave booking click on the 'Employee' tab.



2. Now click on 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 Balances - As At Period End Date - 30 Jan 2010

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

Current Bookings

0 items found, nothing to display.

Pending Requests

0 items found, nothing to display.

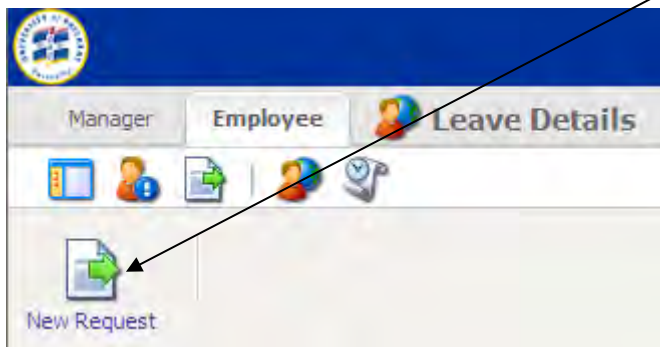
Leave History from 26 May 2007

Options: ☒ Annual Leave | ☒ Sick Leave | ☒ Long Service Leave | ☒ Other Leave

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

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.

4. In the above example, the employee has sufficient Annual Leave (118.31 hrs) to make a booking. They would be able to book a maximum of 16 days Annual Leave (provided their supervisor approves it)
Therefore they are able to book leave by clicking on the 'New Request' button.



5. The following screen will be displayed.

A screenshot of a web application window titled 'Self Service :: Leave - University of Ballarat'. The main heading is 'Create New Leave Request'. Below the heading is a 'Save' button and a note: 'Required fields are marked in red.' The form contains the following fields:

- Position:** A dropdown menu with 'Team Leader' selected.
- Leave Type:** A dropdown menu with 'Annual Leave (73.50)' selected.
- Start Date:** A date field with '24 Feb 2010' and a calendar icon.
- End Date:** A date field with '24 Feb 2010' and a calendar icon.
- Calculated Amnt:** A text field with '7.35' and a unit dropdown with 'Hours' selected.
- Explanation:** A text area.

6. The user must first select their appropriate position. (They may have more than 1 position within the University. ie. A Casual position and also a full-time continuing 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.

Self Service :: Leave - University of Ballarat

Create New Leave Request

Required fields are marked in red.

Save

Leave Request

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

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

7. Now select the desired leave type you are making a booking for. (in this case, Annual Leave). Click on the 'Leave Type' dropdown menu arrow, then select from list.

Self Service :: Leave - University of Ballarat

Create New Leave Request

Required fields are marked in red.

Save

Leave Request

Leave Type: Annual Leave (73.50)

Start Date: 23 Feb 2010

End Date: 23 Feb 2010

Calculated Amnt: 7.35 Hours


Actual Amount:


Hours or Days: ☒ Hours

Explanation:

Again, please note that for all other types of leave (Leave without Pay, Maternity Leave, Paternity Leave, Work Cover Leave and Long Service Leave) are all unavailable in Self-Service. Please continue using the existing paper-based forms for these types of leave.

8. Now you must select the date(s) you would like to make a booking for. To do this click on the picture of the calendar icon to the right of the Start Date & End Date fields, then select the day on the calendar that appears. (This must be done for both the start date and end date fields)

Start Date: 

End Date: 

For this example, the employee wants to make a booking for the 25th and 26th February. Therefore, they would select '25' on the calendar for the Start Date, then select '26' on the calendar for the End Date.

Start Date:

End Date:


Calculated Amnt: Hours


Explanation:

February, 2010							
Today							
wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
5	1	2	3	4	5	6	7
6	8	9	10	11	12	13	14
7	15	16	17	18	19	20	21
8	22	23	24	25	26	27	28
9	1	2	3	4	5	6	7
10	8	9	10	11	12	13	14

Thu, Feb 25

You will notice that the 'Calculated Amnt' field is automatically populated. In this case, 14.7 hrs total the employee has booked. This is a full-time general staff member working 7.35 hrs a day. (2 X 7.35 = 14.7 Hrs)

Start Date: 

End Date: 

Calculated Amnt: Hours

9. The 'Actual Amount' field must also be populated by the user. This is to confirm that the Calculated Amount is correct. Please enter the same value as the Calculated Amount.

Actual Amount:

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


Explanation:

11. After you have completed filling out the leave request form click on the 'Save' button

Self Service :: Leave - University of Ballarat

Create New Leave Request

Required fields are marked in red.

 Save

12. 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 away you can send it to another supervisor/manager within your department 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.

Now click on the 'Send To' button. An email will be sent to your Supervisor / Manager explaining to them that you have a leave request for them to action.

Self Service :: Workflow WorkFlow :: Addressee - University of Ballarat

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]

13. If another screen appears after you have clicked on the 'Send To' button it will be asking you if you would like to book any further leave for any other positions you may hold. (which position you are using the leave up for). In the below example, the employee held a Casual position also, therefore the 'Not Required' button should be clicked. In most cases, the 'Not Required' button can be selected.

Self Service :: Leave - University of Ballarat

Create New Leave Request

Required fields are marked in red.

Save **Not Required**

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

14. Now you will notice the leave you just requested will appear under the 'Pending Requests' heading. If you have made an error in your leave request, you can delete it by clicking on the red and white 'cross' button or you can amend the existing request by clicking on the 'Change' button.

Leave Details

Manager Employee **Leave Details**

[New Request](#)



Leave Balances - As At Period End Date - 30 Jan 2010

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

Current Bookings

0 items found, nothing to display.

Pending Requests

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

15. You will need to click on the 'Confirm' button if you want to delete your leave request.

Self Service :: Leave Delete Leave Request - University of Ballarat

Delete Leave Request

 [Confirm](#)

Delete Request

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

16. When you amend/change a current leave request the following screen appears. After you make the changes, you must click on the 'Update' button.

The screenshot shows a web application window titled "Self Service :: Leave Change Leave Request - University of Ballarat". The main heading is "Change Leave Request". Below the heading, there is a message: "Required fields are marked in red." and an "Update" button. The "Leave Request" section contains the following fields:

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

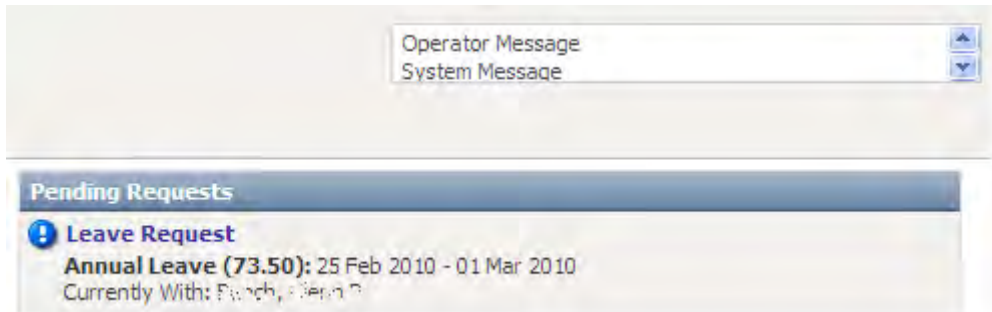
17. Please note that if you have made a change to your leave request, you will need to send it again to the Supervisor / Manager for approval. Again, click on your supervisor on the drop-down list to send the request/email to then click on the 'Send To' button.

The screenshot shows a web application window titled "Self Service :: Workflow Workflow :: Addressee - University of Ballarat". The main heading is "Workflow :: Addressee". Below the heading, there is a message: "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." and a "Send To" button. The "Send To" section contains the following fields:

Next Task:	For Supervisor / Mgr Approval
Send To:	[Drop-down list]
Comments:	[Text area]

18. 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 which confirms that you have a pending leave request and also specifies the type of leave you requested, the dates you have requested and also the progress of your request. Users may find the progress update very useful where it will tell them who the request is currently with.

ie. The request will either be with your supervisor/manager for approval or it will be at the second stage of the request process, which is with payroll for approval.



If you click on the blue 'Leave Request' link, you will be brought back to the main 'Leave Details' screen.

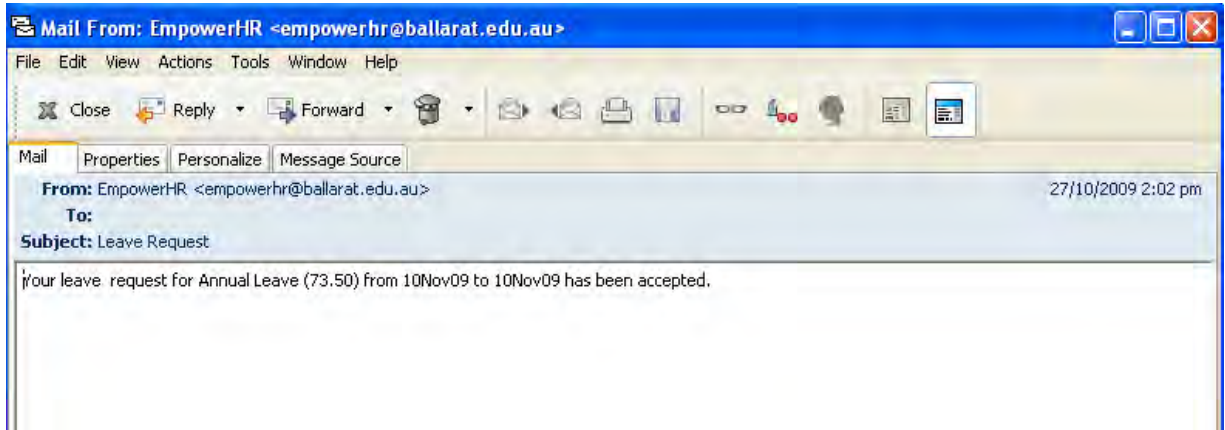
19. Once your supervisor / manager has approved your leave, you will receive an email which is sent to your University (Business email) Outlook email address.

The email will look like the example below:





This means that your supervisor is ok for the leave booking to go ahead and it has now been forwarded to Payroll for final approval. If required, you can click on the link included on the email and it will direct you to the ESS login screen.

20. Finally, when Payroll check over your leave request, they will approve it and the booking will be officially added to the system. Another email will be sent to your Outlook UB email address confirming that your leave has been approved.



21. In ESS on the leave details screen, the leave booking will now appear under the 'Current Bookings' heading (assuming it is for a future booking). There is no further action required and your leave request is complete.

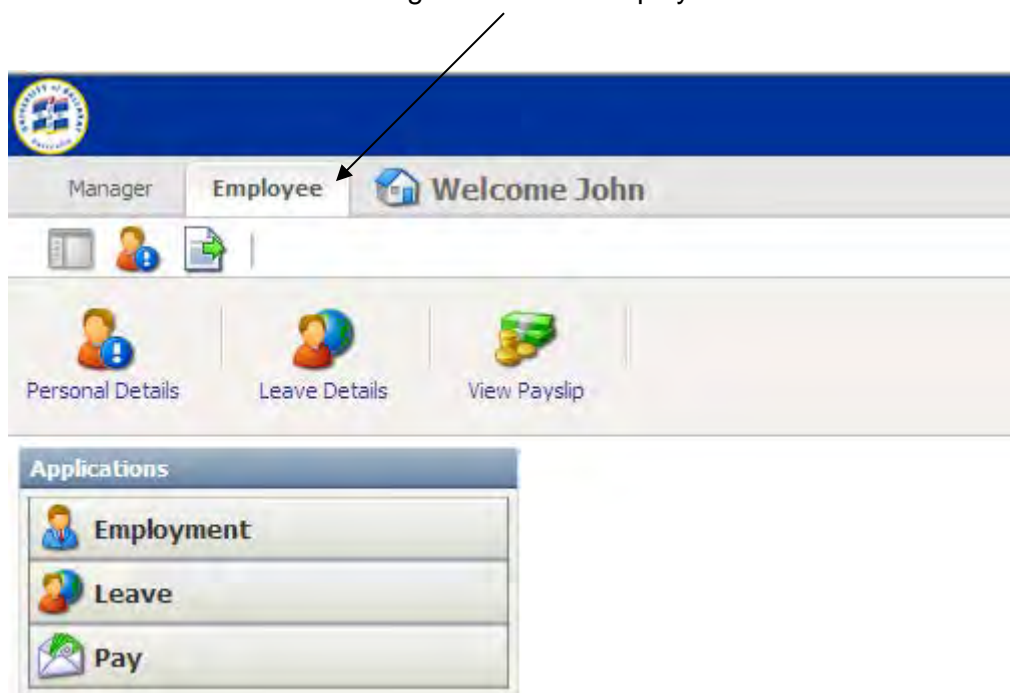
Current Bookings				
Leave Type	Position	Start	End	Actions
Annual Leave (73.50)		25 Feb 2010	01 Mar 2010	 

Uploading Attachments to a Leave Request - Sick Leave Example

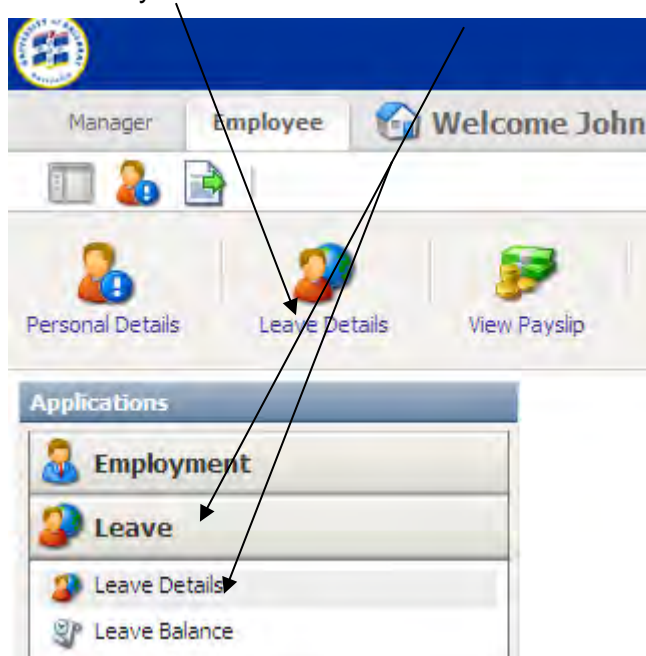
Self-Service users now have the ability to attach documents to a new leave request on the system. This is particularly useful for sick leave bookings where the user can now attach a scanned, electronic copy of the medical certificate to a leave booking. This means that the employee submitting the leave booking, the Manager approving the booking and the Payroll team finalising the booking will all be able to view the attached Medical Certificate.

This will now speed up the approval process as the Payroll team will not need to wait for a hard copy or emailed copy of the medical certificate to be forwarded to them before making the final approval. (The payroll team must sight the Medical Certificate before actioning the request and the employee submitting the request still must specify that they have a medical certificate.)

1. To make a Sick Leave booking click on the 'Employee' tab.



2. Now click on 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.

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

4. Click on the 'New Request' button.

5. Now select Sick Leave from the 'Leave Type' dropdown menu.

Leave Request

Leave Type: Annual Leave (73.50)

* Start Date: Annual Leave (73.50)

* End Date: Compassionate Leave 76.0

Calculated Amnt: Compassionate Leave 73.5

Actual Amount: Paternity Leave

Hours or Days: Personal Leave 76.0

Explanation: Personal Leave (73.5)

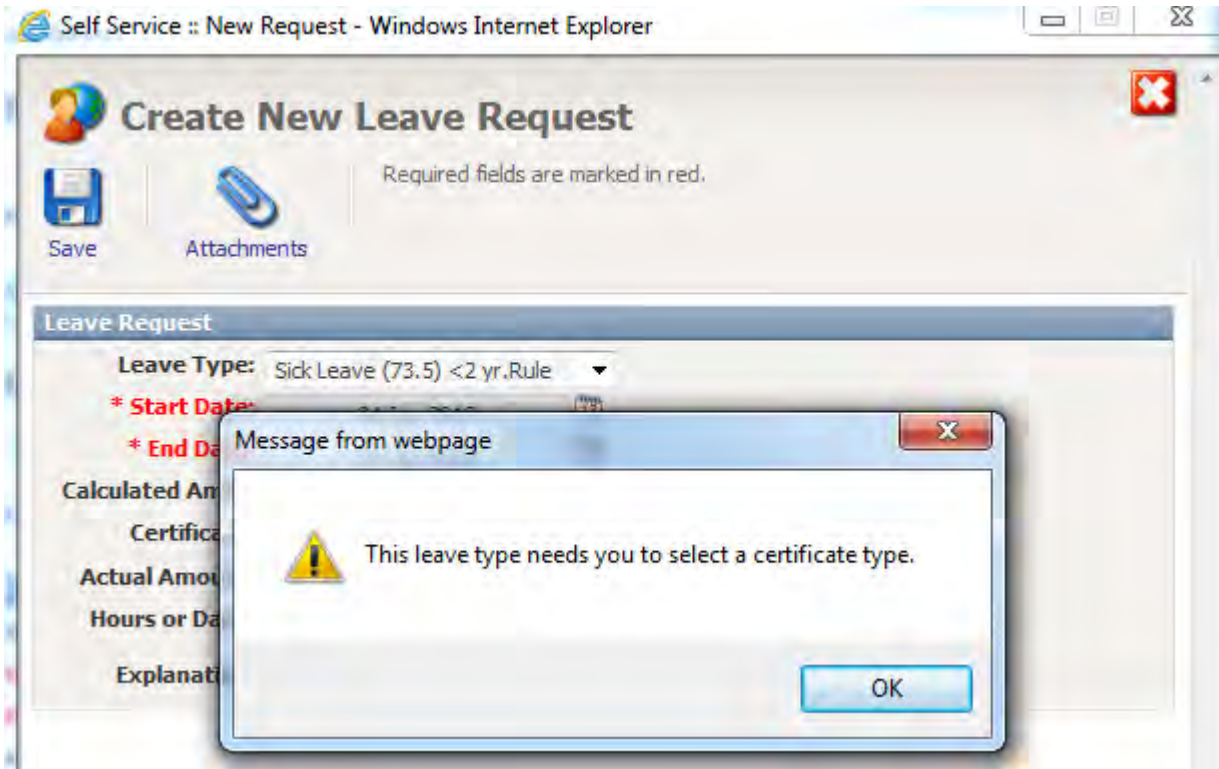
Sick Leave (73.5) <2 yr.Rule

Special Leave (TAFE Teachers)



UB Business/Travel 76.0

UB Business/Travel 73.5

6. Once Sick Leave is selected, a warning message will appear explaining that you must select a certificate type before submitting the request. Click the OK button.



7. Now you must select the date(s) you would like to make a booking for. To do this click on the picture of the calendar icon to the right of the Start Date & End Date fields, then select the day on the calendar that appears. (This must be done for both the start date and end date fields)

* Start Date:	04 Jun 2013		←
* End Date:	04 Jun 2013		←

8. For this example, the employee wants to make a sick leave booking for a single day, 4th June. Therefore, they would select '4' on the calendar for the Start Date, and also select '4' on the calendar for the End Date.

Self Service :: New Request - Windows Internet Explorer

Create New Leave Request

Required fields are marked in red.

Save Attachments

Leave Request

Leave Type:

* **Start Date:** 04 Jun 2013

* **End Date:** 04 Jun 2013

Calculated Amnt: 7.35 Hours

Certificate:

Actual Amount:

Hours or Days: ☒ Hours

Explanation:

June, 2013

Today

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

Tue, Jun 4 (today)

9. You will notice that the 'Calculated Amnt' field is automatically populated. In this case, 7.35 hrs total the employee has booked. This is a full-time general staff member working 7.35 hrs a day. (1 X 7.35 = 7.35 Hrs)

* **Start Date:** 04 Jun 2013

* **End Date:** 04 Jun 2013

Calculated Amnt: 7.35 Hours

10. 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. For this example the user has selected 'Medical Certificate' as the Certificate type.

Certificate: Medical Certificate

Actual Amount: Carers Certificate

Hours or Days: Medical Certificate

Explanation: None

Paramedical Certificate

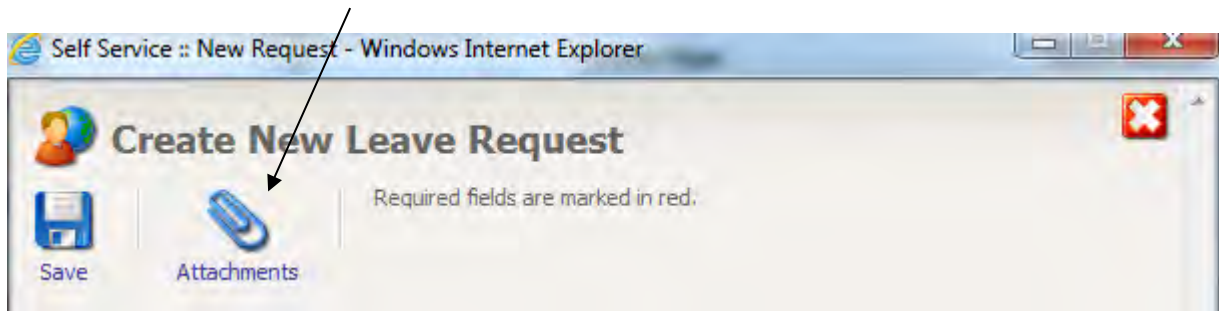
11. The 'Actual Amount' field must also be populated by the user. This is to confirm that the Calculated Amount is correct. Please enter the same value as the Calculated Amount.

Actual Amount: 7.35

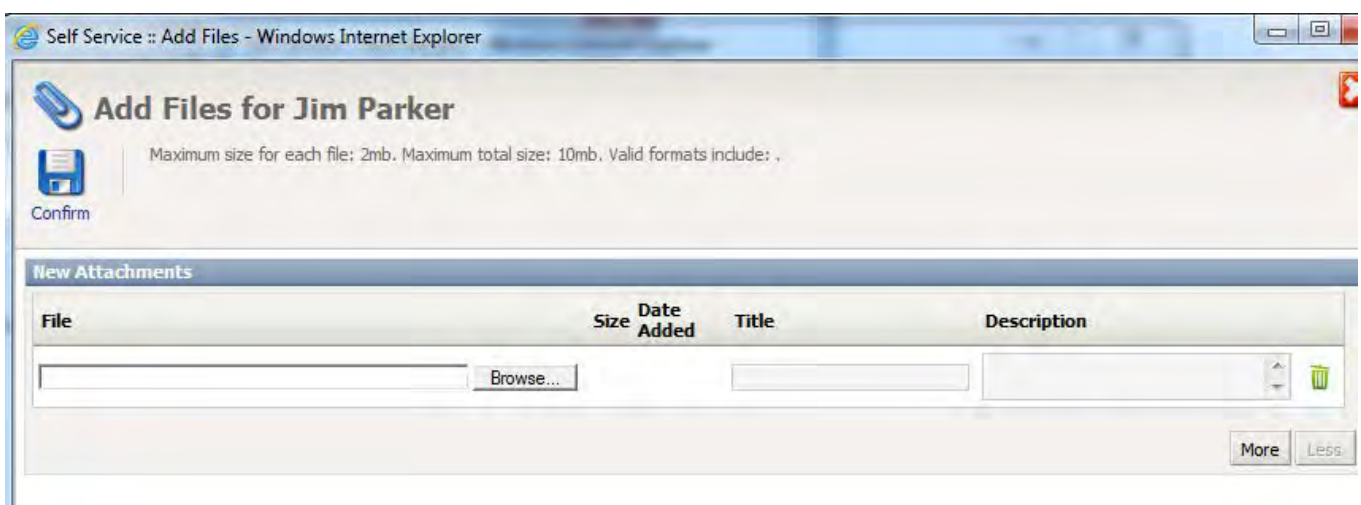
12. The 'Explanation' field is an optional field for staff that wish to give more detail to why they are booking the leave.

Explanation:

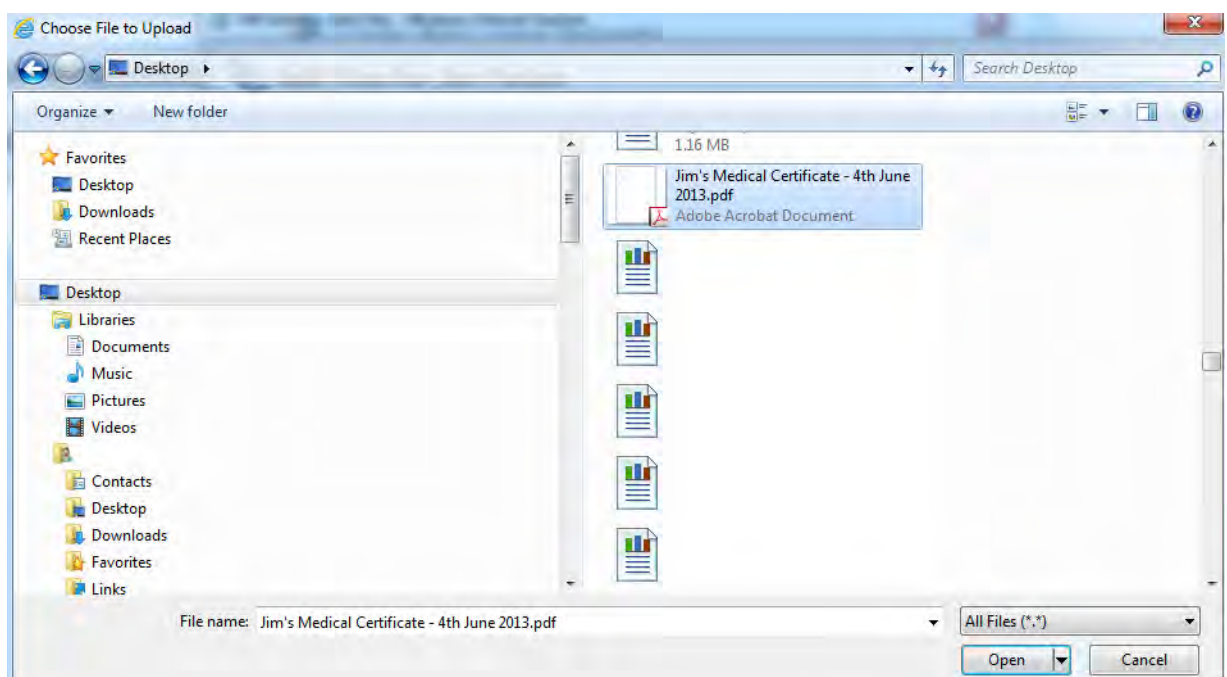
13. Now the user has entered all of the details for the sick leave request, all they must do now is attach a copy of the medical certificate. To add an attachment click on the blue paperclip button with the heading 'Attachments'.



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



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





16 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.

Self Service :: Add Files - Windows Internet Explorer

Add Files for Jim Parker

Maximum size for each file: 2mb. Maximum total size: 10mb. Valid formats include: .

 Confirm

File	Size	Date Added	Title	Description
en\Desktop\Jim's Medical Certificate - 4th June 2013.pdf Browse...			Medical Certificate - Jim Parker	Medical Certificate for the 4th June 2013 

[More](#) [Less](#)

17 Now click on the 'Confirm' button which will attach the file to your leave booking.

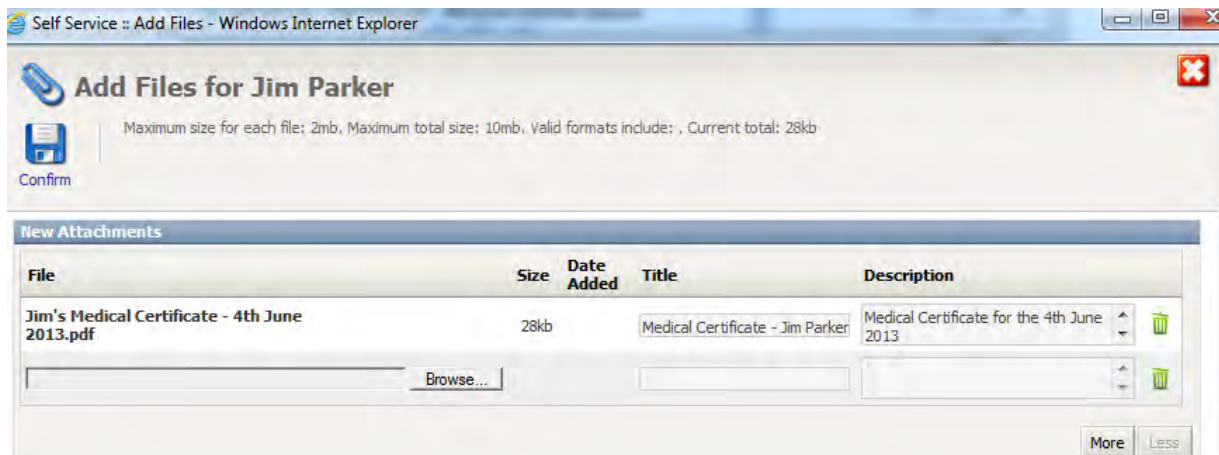
Add Files for Jim Parker

Maximum size for each file: 2mb. Maximum total size: 10mb.

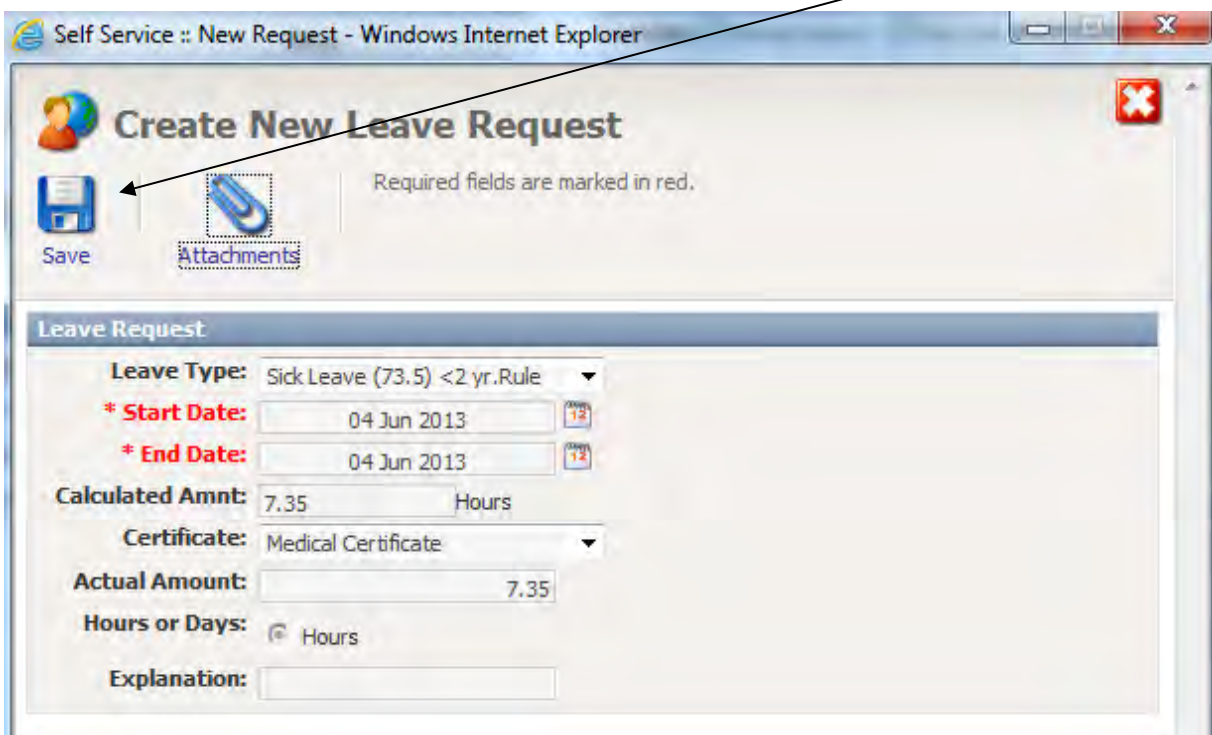
 Confirm

File
en\Desktop\Jim's Medical Certificate - 4th June 2013.pdf Browse...

18. If you want to double check that the file is attached to the booking you can now click on the Attachments button again and you will see the attachment along with the title and description you entered. Further to this you are also able to attach additional files if required by clicking on the 'Browse' button again.



19 After the booking details have been completed and the file is attached click on the 'Save' button.




20. 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 directly report to from the drop-down menu. If your supervisor is away you can send it to another supervisor/manager within your department 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.

Now click on the 'Send To' button. An email will be sent to your Supervisor / Manager explaining to them that you have a leave request for them to action.

Self Service :: Workflow WorkFlow :: Addressee - University of Ballarat

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

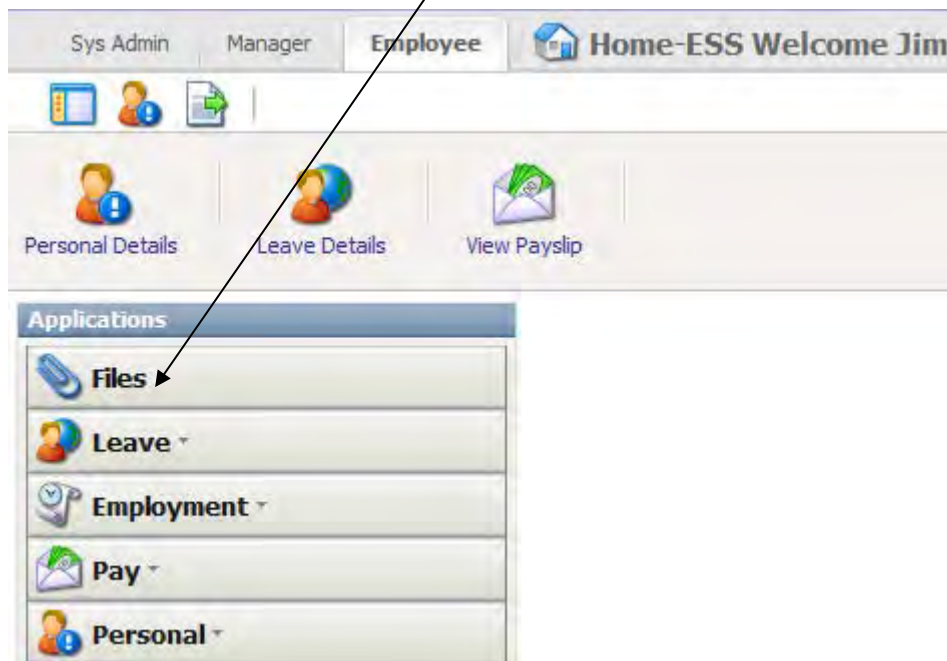
Next Task: For Supervisor / Mgr Approval

Send To:

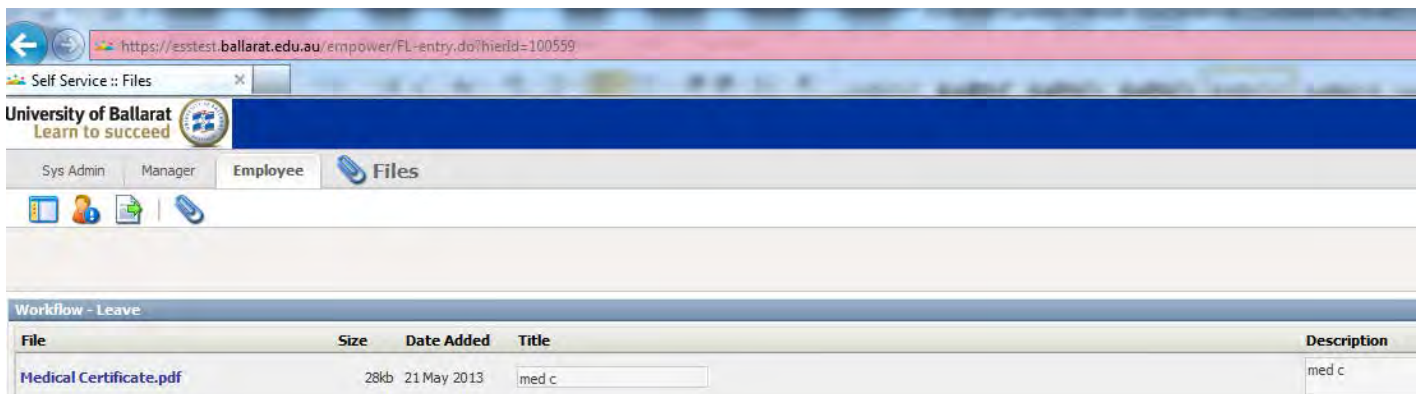
Comments:

Retrieving files previously attached to Leave Bookings

1. You may notice that there is a 'Files' button which appears on the Home page of self-service. This allows users to retrieve files that they may have attached to a leave booking in the past.

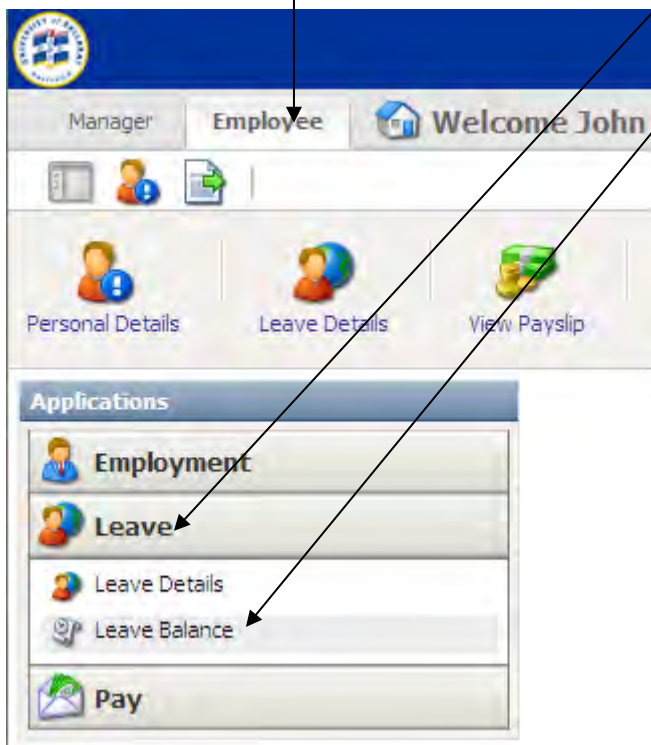


2. Users have the ability to open all historical attachments by simply clicking on the File name(s) listed on the following screen. (The file name is highlighted in blue text)



Viewing Leave Balances for Future Dates

1. If you are wanting to know what your leave balance will be at a specific date, you can do so by clicking on the Employee Tab, Selecting the 'Leave' button, then by selecting the 'Leave Balance' button.



2. The following screen will display

This screenshot shows the 'Leave Balance' screen. At the top, there is a blue header with a logo on the left and a 'Leave Balance' title on the right. Below the header, there are two tabs: 'Manager' and 'Employee'. The 'Employee' tab is selected. Under the 'Employee' tab, there are three main sections: 'Personal Details', 'Leave Details', and 'View Payslip'. Below these sections, there is a list of applications: 'Employment', 'Leave', 'Leave Details', 'Leave Balance', and 'Pay'. The 'Leave Balance' application is selected. The screen displays a table of leave balances as at 30 Jan 2010. Below the table, there is a form to enter leave balance criteria.

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

Enter Leave Balance Criteria


Balance Date: 23 Feb 2010

Include LSL: ☐

Calculate


- For the system to calculate future leave entitlements you can click on the calendar icon to the right of the 'Balance Date' field and specify a date. After you have selected the date, click on the 'Calculate' button. (you can also choose whether to include LSL balances by using the 'Include LSL' check-box)

Enter Leave Balance Criteria

Balance Date  ←

Include LSL ☐ ←

Enter Leave Balance Criteria

Balance Date 

Include LSL ☐


June, 2010

Today

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

Wed, Jun 30

Enter Leave Balance Criteria

Balance Date 

Include LSL ☐

←

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

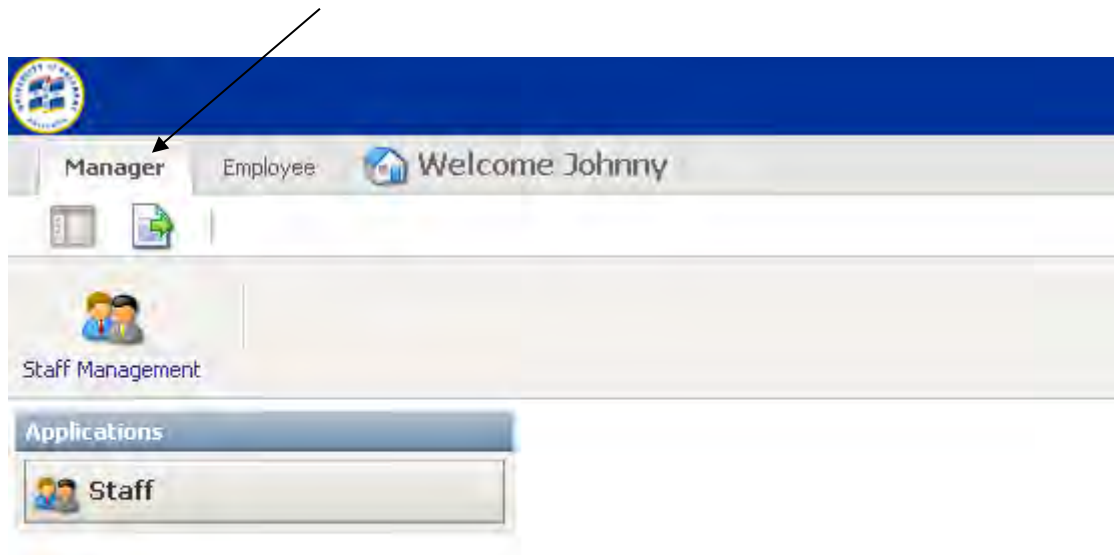
Leave Balances as at 30 Jun 2010		
Leave Type	Amount	Units
Annual Leave (73.50) for Service Desk Team Leader	178.68	hours
Sick Leave (73.5) <2 yr.Rule for Service Desk Team Leader	293.86	hours

Manager Self-Service – (MSS) Operation Manual

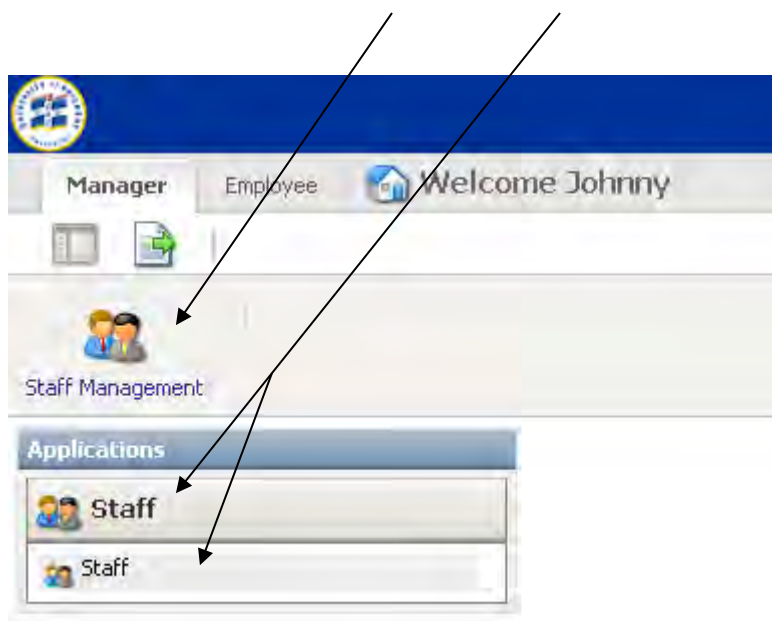
The Manager Self-Service component is available to Managers/Supervisors which enables them to approve/reject leave requests for staff, view future leave bookings for individual staff members, access a 'Leave Absence Chart' which displays all staff that report to them and the days they will be on leave. Managers/Supervisors can also run leave balance enquiries for all team members.

Accessing MSS, Searching for Staff using Filters & Accessing Individual Staff Info

1. Managers and Supervisors will notice they have 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. Now click on 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.

The screenshot shows the 'Staff Lookup' window with a 'Search Filter' dialog box open. The dialog box has fields for Name, Lists, Position, Section, and Location. The Position field is expanded, showing a list of roles: Co-ordinator, HRMIS; Manager, Payroll & Systems; Payroll Officer - Full Time; and Payroll Officer - Part Time. The Section field is set to 'Human Resources' and the Location field is set to 'MTH'. The 'Reset Search' button is visible in the top left of the main window.

Name	Email	Position	Temporary	Section	Location
------	-------	----------	-----------	---------	----------

You can select staff you would like to view information about by using the 'Search Filter'. You can find a staff member by typing their name in the 'Name' field or select by 'Position' title or select Staff by Section or Location. 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 'Staff Lookup' window with the 'Search Filter' dialog box open. The 'Name' field is filled with 'Parker'. The 'Position' field is expanded, showing a list of roles: Co-ordinator, HRMIS; Manager, Payroll & Systems; Payroll Officer - Full Time; and Payroll Officer - Part Time. The 'Section' field is set to 'Human Resources' and the 'Location' field is set to 'MTH'. The 'Reset Search' button is visible in the top left of the main window. The 'Staff Lookup' table below the dialog box shows one record for James Parker.

Name	Email	Position	Temporary	Section	Location
Parker, James D	a.christensen@ballarat.edu.au	Co-ordinator, HRMIS	No	Human Resources	MTH

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 'Staff Lookup' window with tabs for Manager, Employee, and Staff. Below the tabs are icons for 'Reset Search', 'Leave Balances', and 'Absence Chart'. The main area contains a table with the following data:

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

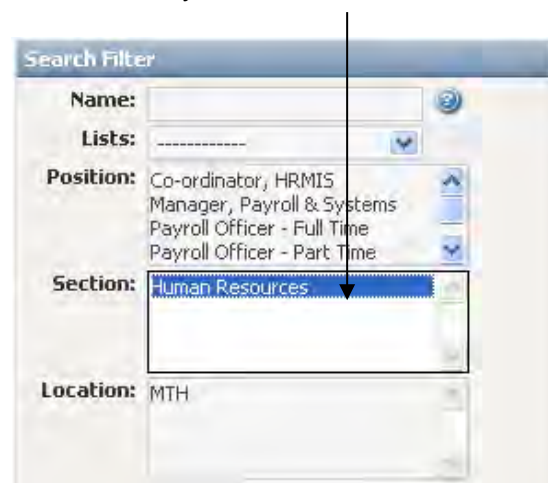
Hold down the Shift key
to select & deselect
Staff Positions



The 'Search Filter' dialog box is shown with the 'Position' list expanded. The list contains the following items: 'Co-ordinator, HRMIS', 'Manager, Payroll & Systems', 'Payroll Officer - Full Time', and 'Payroll Officer - Part Time'. The 'Section' is set to 'Human Resources' and the 'Location' is set to 'MTH'.

Searching Staff by Section

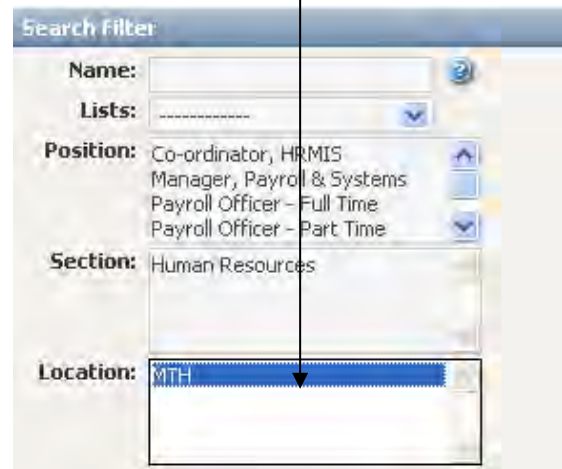
If the Manager/Supervisor has staff reporting to them from more than one section, they can select the Section of their choosing. (in this example there is only one section to choose from)



The 'Search Filter' dialog box is shown with the 'Section' list expanded. The list contains the following items: 'Co-ordinator, HRMIS', 'Manager, Payroll & Systems', 'Payroll Officer - Full Time', and 'Payroll Officer - Part Time'. The 'Section' is set to 'Human Resources' and the 'Location' is set to 'MTH'.

Searching Staff by Location

Staff can also be filtered by Campus Location. For example, Mt. Helen Campus. (in this example there is only one campus to choose from)



Search Filter

Name:

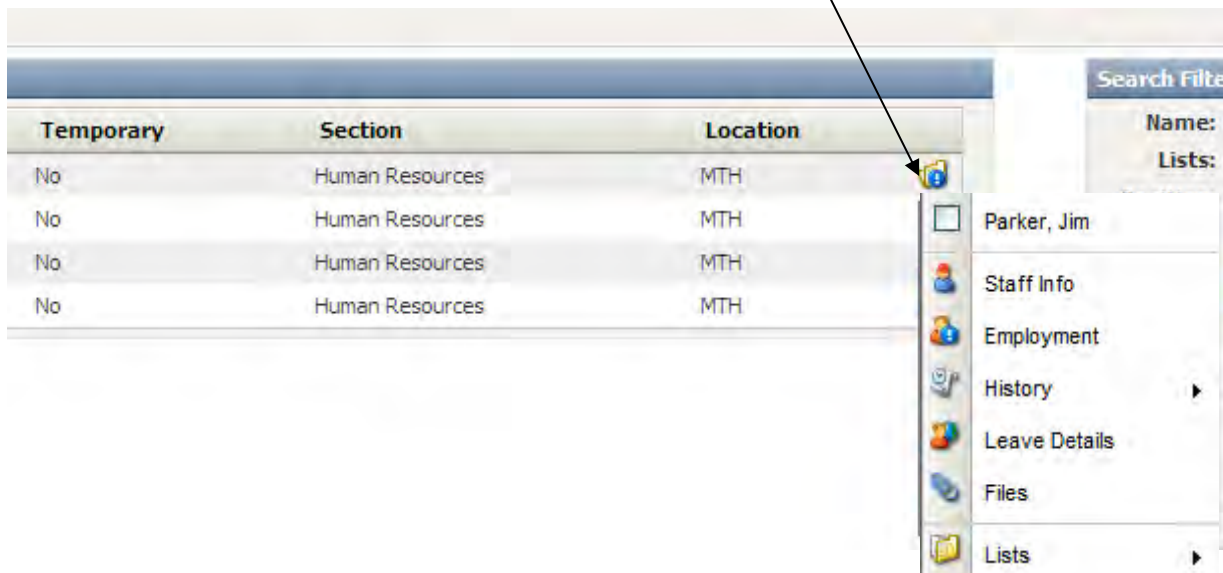
Lists:

Position: Co-ordinator, HRMIS
Manager, Payroll & Systems
Payroll Officer - Full Time
Payroll Officer - Part Time

Section: Human Resources

Location: MTH

- Once you have selected the desired staff, you can now lookup individual staff info, employment details, employee history details, view leave details and leave 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 each employee record you selected earlier.



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

Search Filter

Name:

Lists:

Parker, Jim

Staff Info

Employment

History

Leave Details

Files

Lists

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

Staff Info

The Staff Info Screen will display Personal Information for the employee such as Address, Phone No, Mobile No, Work Phone No., Work Email address and Emergency Contact Information.

The screenshot shows a web application window titled "Self Service :: Staff Information - University of Ballarat". The user is logged in as "Cathy Murphy". The interface is divided into several sections:

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

Employment

The 'Employment' screen will display the current Employment information such as Commencement Dates, Pay information, Position No, Location, Cost Centre Code, 'Reports To' relationship and other useful information.

The screenshot shows a web application window titled "Self Service :: Employment - University of Ballarat". The user is logged in as "Cathy Murphy". The interface displays employment details as of 29 Feb 2008:

- 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:**
 - Effective: 06 Jan 2008
 - Reports To: Manager, Payroll & Systems
 - Organisation: CS
 - Location: MTH
 - Cost Centre: SSO 1138 30000
 - Class/Level: HEW
 - Next Increment: 04 Jun 2008
 - Type: Permanent
 - Conditions: Part Time
 - Redeployee?:
 - Base Hours: 36.75
 - FTE: 50.00%
 - Position No: 00366
- Pay:**
 - Salary: \$
 - Allowances: \$0.00
 - HDA: \$0.00
 - Total: \$
 - Pay Basis: Hourly
 - Pay by exception: y

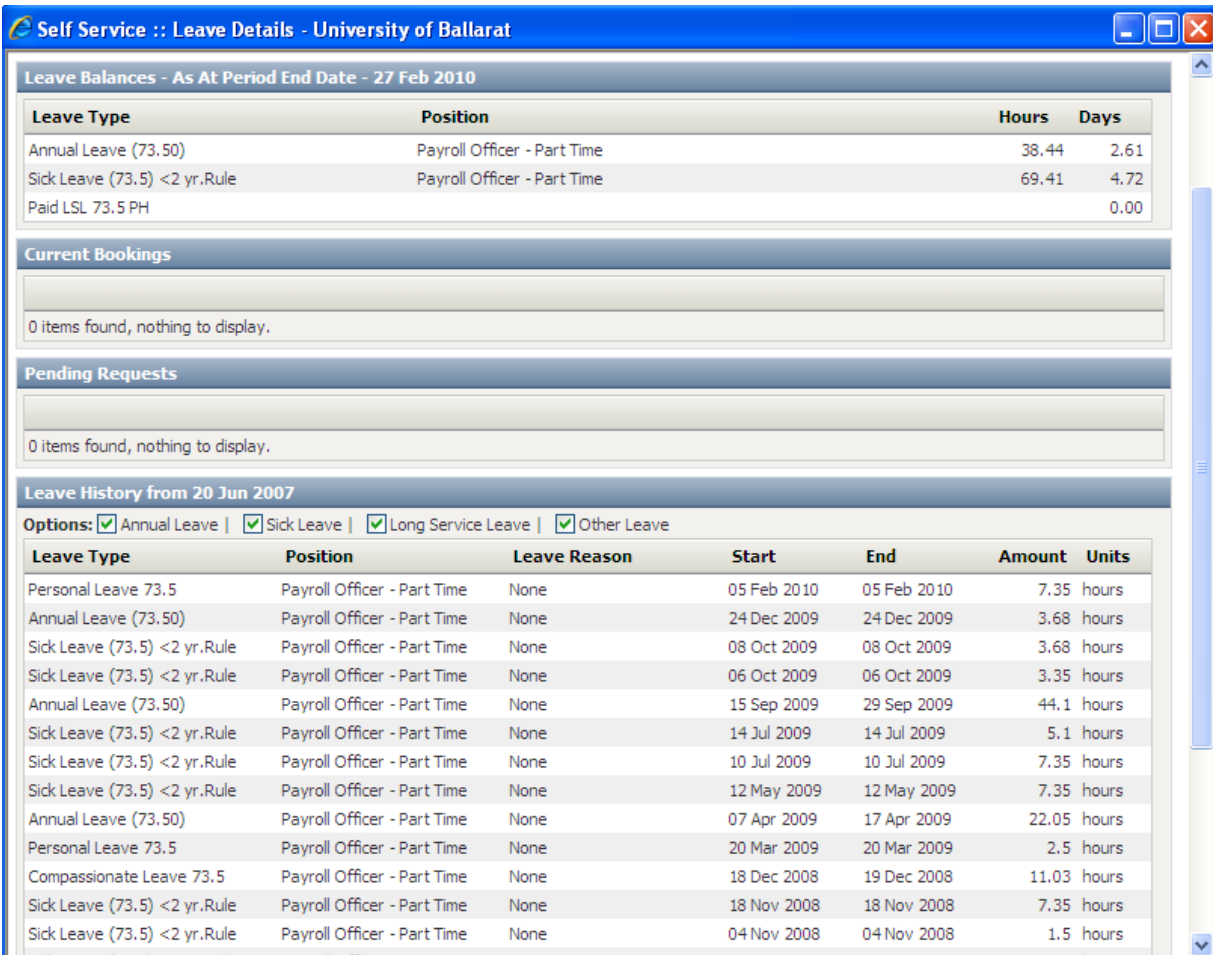
History > Employee History

Managers/Supervisor's are able to view staff Salary & Position History on this screen. You can identify salary increments, position start and end dates, hourly rates, classifications and also classification levels.

Self Service :: Employee History - University of Ballarat								
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 they have made, and Pending requests for leave they have made. (requests that need to be rejected/approved) and also displays a historical list of all Leave taken for all types of leave.



Self Service :: Leave Details - University of Ballarat

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 in the past by an employee which contained an attachment ie. Medical Certificate, you are able to view the file again by clicking on the blue paper clip (Files) button.



Self Service :: View Files - Windows Internet Explorer

View Files for Jim Parker

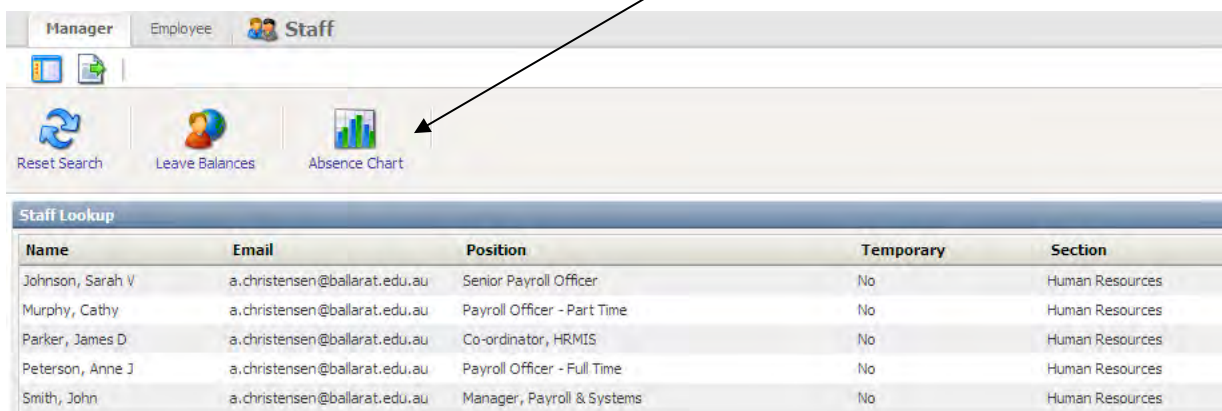
Workflow - Leave

File	Size	Date Added	Title	Description
Jim's Medical Certificate - 4th June 2013.pdf	28kb	04 Jun 2013	Jim Parker - 4th June 2013 Sick	Medical Certificate for the 4th June 2013

To load up the file click on the file name highlighted in blue.

Absence Chart

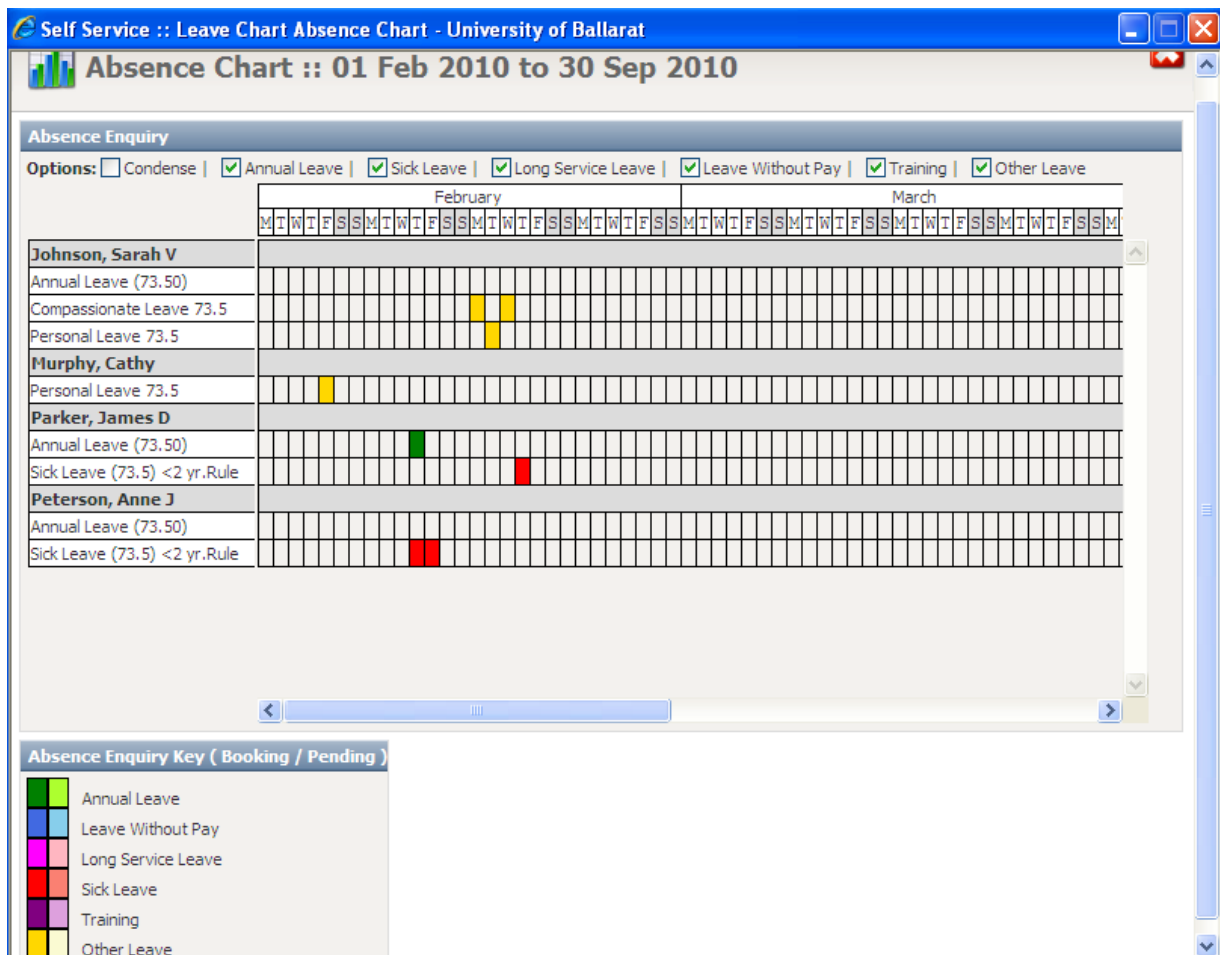
1. After selecting staff using the Search Filter (as discussed earlier) you can view Pending/Current leave bookings. This information is displayed on a Gantt Chart which is very useful for finding out the availability of staff in busy work periods and the Chart has a colour coded Key which makes it easier to identify different types of leave. Click on the 'Absence Chart' button to display the Absence Chart.



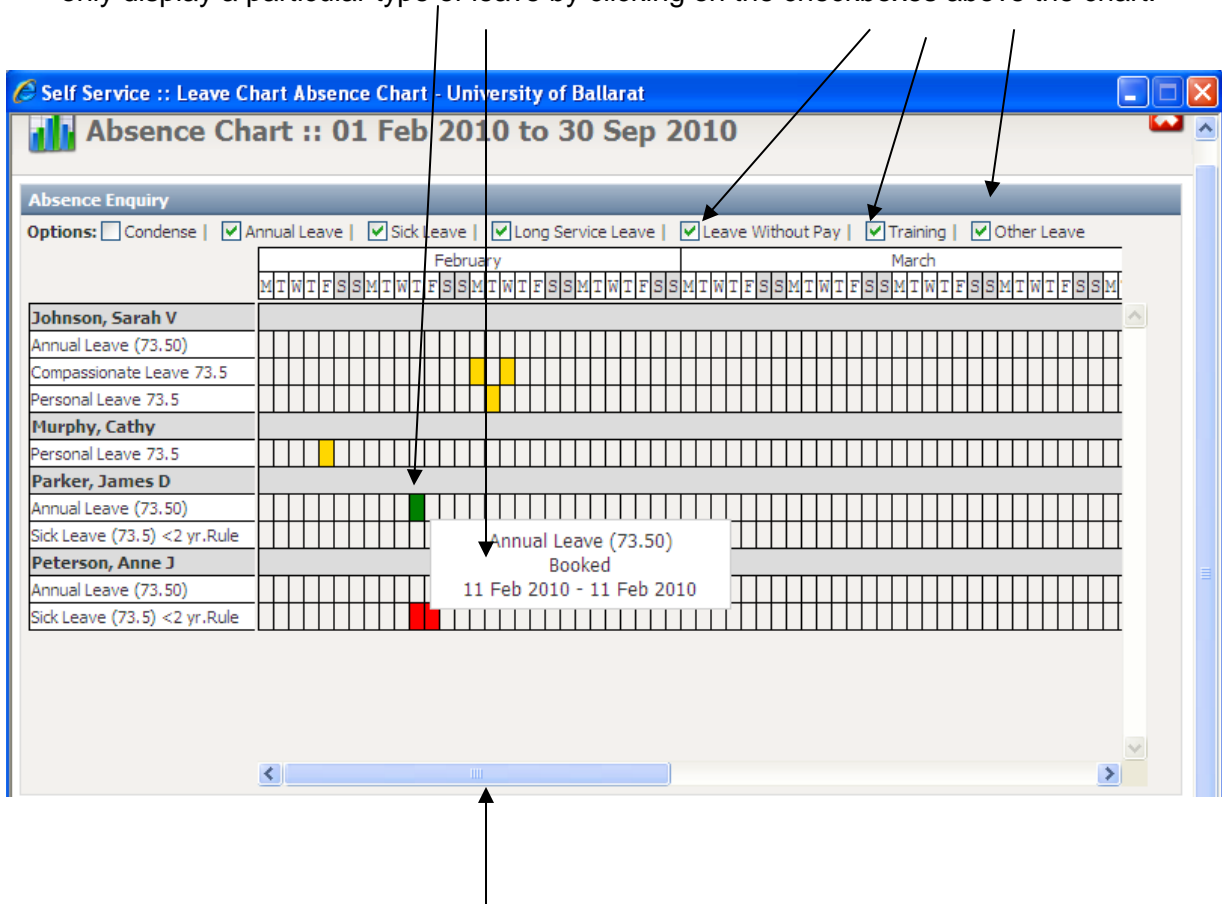
The screenshot shows a web interface with tabs for 'Manager', 'Employee', and 'Staff'. Below the tabs are buttons for 'Reset Search', 'Leave Balances', and 'Absence Chart'. An arrow points to the 'Absence Chart' button. Below the buttons is a 'Staff Lookup' table.

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

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.



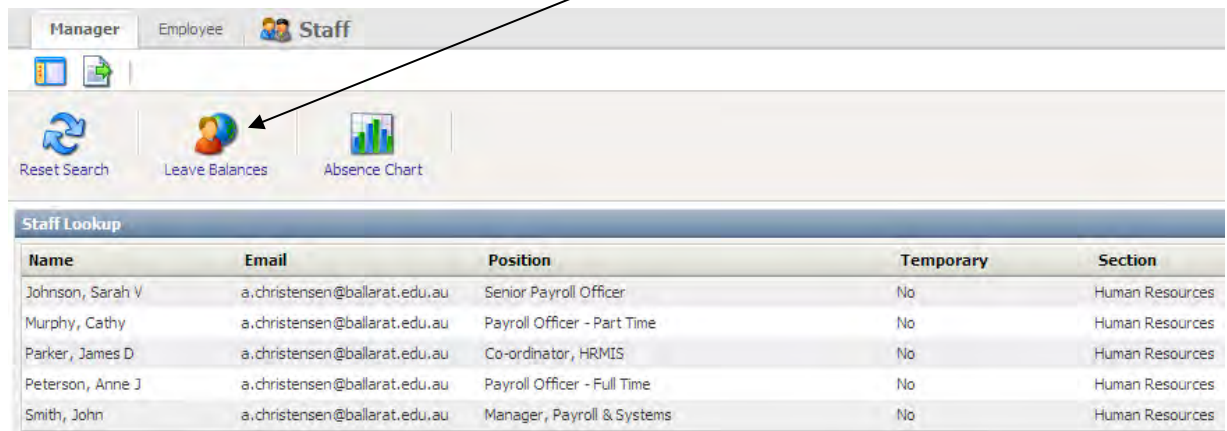
- If you require further information regarding staff booked leave, you can hover the mouse cursor over the coloured boxes. In the example below, by hovering over the green box, a pop-up window appears explaining it is Annual Leave booked and specifies the Start and End Date for the Leave booked. You can filter the report to only display a particular type of leave by clicking on the checkboxes above the chart.



Please note that you can also 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. Managers/Supervisors have the ability to view leave balances for their staff including Annual Leave, Long Service Leave, Sick Leave and Other types of leave (Compassionate leave and Personal 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

Annual **Long Service** **Sick** **Other**

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

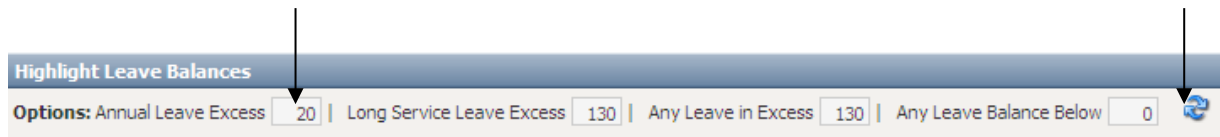
- Another useful feature is the 'highlighting' of leave balances. This feature allows you to specify how many days of leave accrued by a staff member until it is considered 'excessive'. You can enter the amount of days until considered excessive into the fields provided and once this is done you must 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 Manager/Supervisor 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.

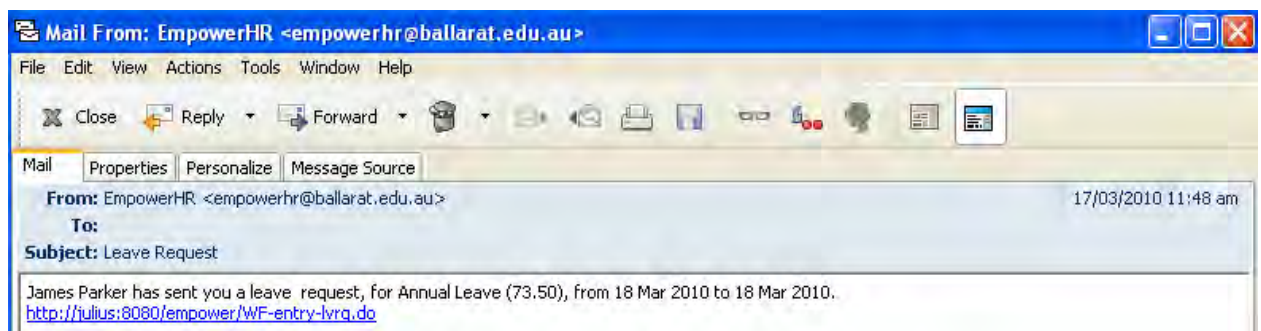
<div> <div>Annual</div> <div>Long Service</div> <div>Sick</div> <div>Other</div> </div>					
Section	Name	Leave	Balance	Excess	As At
Human Resources	Johnson, Sarah V	Annual Leave (73.50)	20.8 / 152.6	0.8/4.5	27 Feb 2010
	Murphy, Cathy	Annual Leave (73.50)	2.6 / 38.4	0/0	27 Feb 2010
	Parker, James D	Annual 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 of Ballarat Outlook Email address and the email's Subject will read 'Leave Request' and the Sender will read 'EmpowerHR' (please see below)

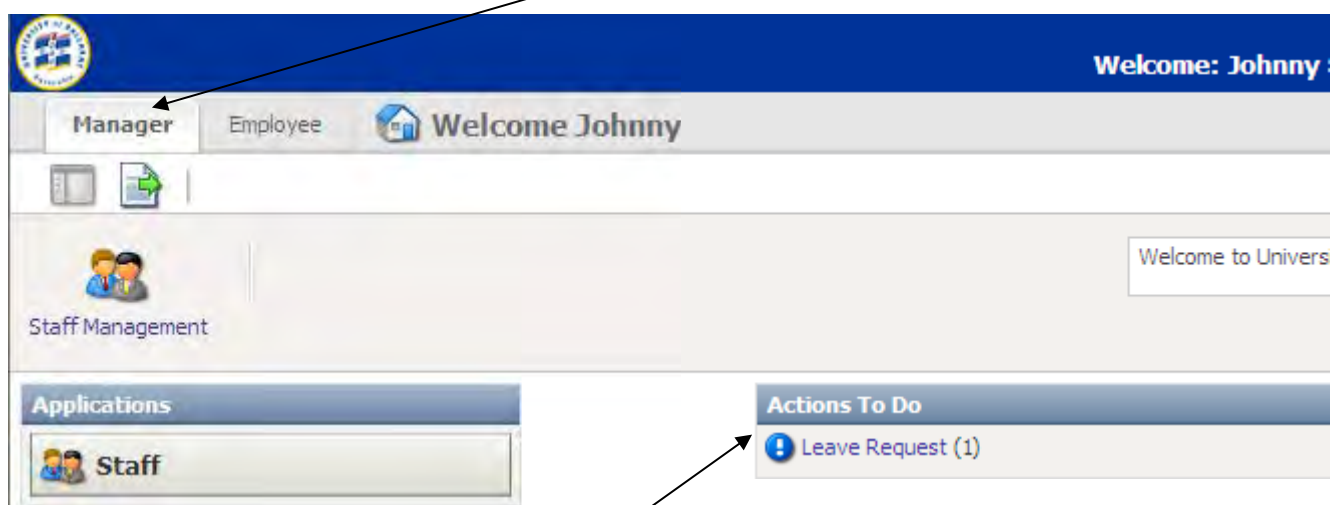


2. When opening the email, it should look like the following:



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 1 day being the 18th March 2010.

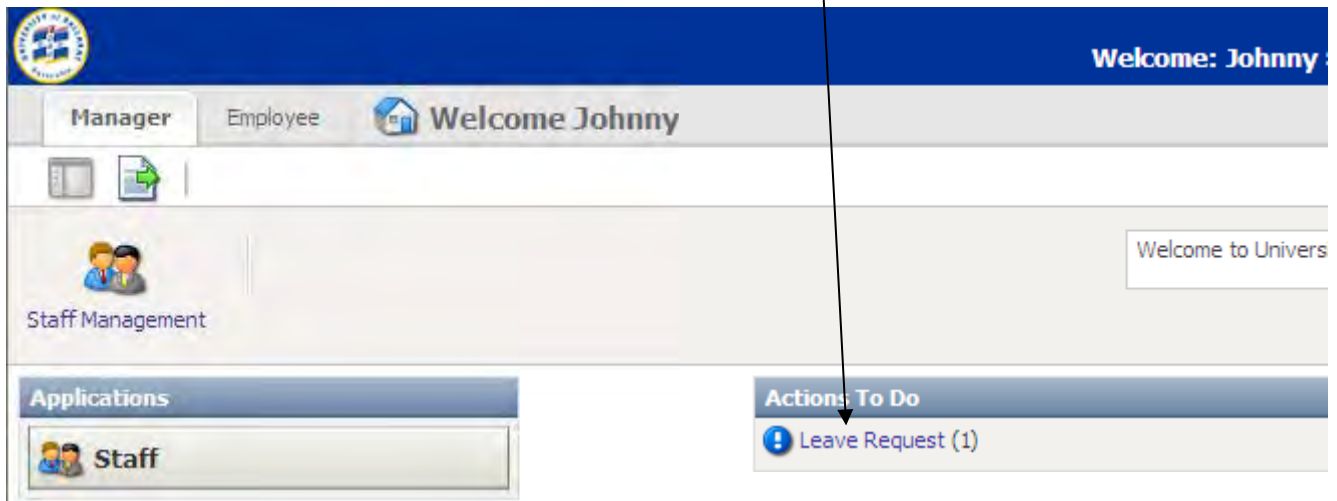
3. Now the Supervisor/Manager can action the request by either logging into the Self-Service system by clicking on the link on the email or by accessing the site from their Browser's Favourites list. The Self-Service link may also be available via the UB Internal Gateway.
4. Now ensure that once logged into the Self-Service system that you are in the 'Manager' section (MSS) by clicking on the 'Manager' tab as it may default to Employee Self-Service (ESS).



You will notice that once logged in there is a new option on the MSS Home Page called 'Actions To Do'. This appears when a member of your staff has requested

leave.

5. To action any outstanding leave requests click on the 'Leave Request' link.



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)

Employee	Leave Type	Start	End	Calculated Amt
! Parker, James D	Annual Leave (73.50)	Thu 18 Mar 2010	Thu 18 Mar 2010	

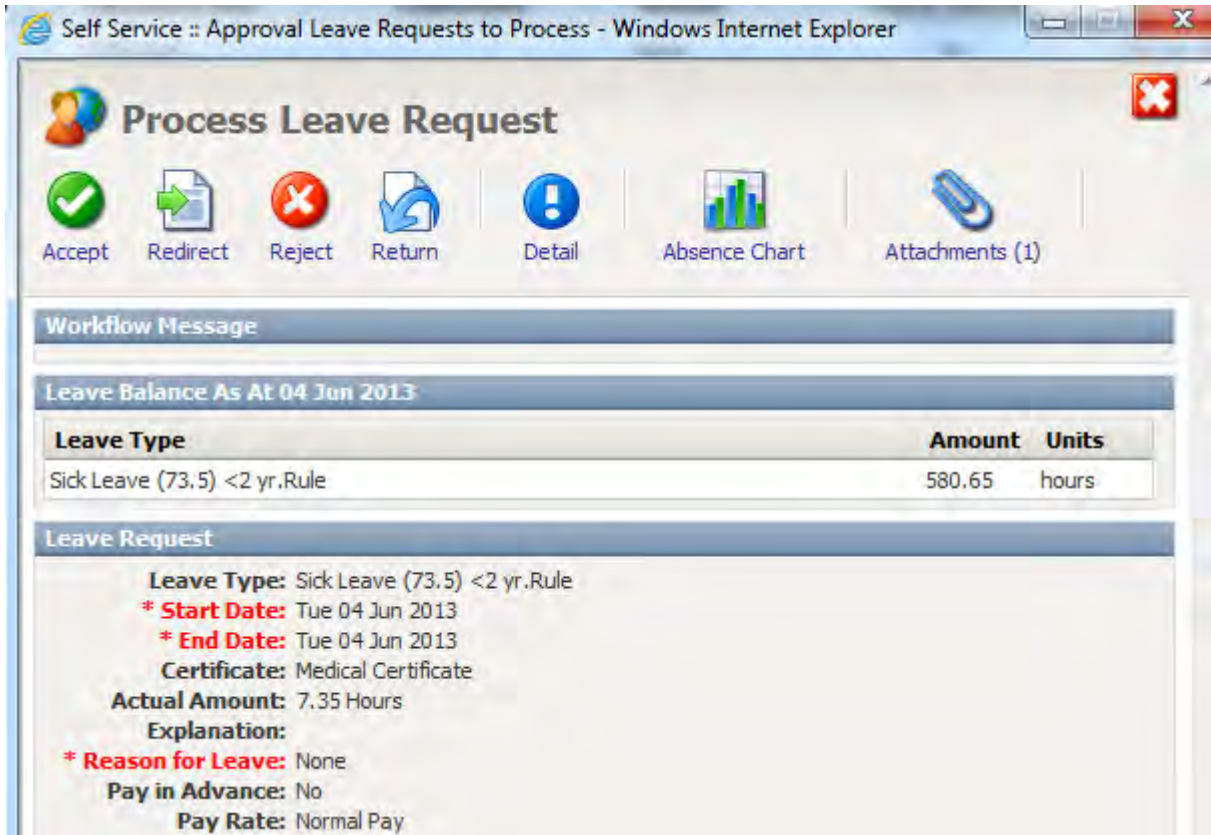
Reason	Pay in Advance	Lodged	Request Type	Last Action
Booking	No	17 Mar 2010	Add	17 Mar 2010 @ 11:46

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

When clicking on the Edit button the following screen will appear.



Self Service :: Approval Leave Requests to Process - Windows Internet Explorer

Process Leave Request

Accept Redirect Reject Return Detail Absence Chart Attachments (1)

Workflow Message

Leave Balance As At 04 Jun 2013

Leave Type	Amount	Units
Sick Leave (73.5) <2 yr.Rule	580.65	hours

Leave Request

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

* Start Date: Tue 04 Jun 2013

* End Date: Tue 04 Jun 2013

Certificate: Medical Certificate

Actual Amount: 7.35 Hours

Explanation:

* Reason for Leave: None

Pay in Advance: No

Pay Rate: Normal Pay

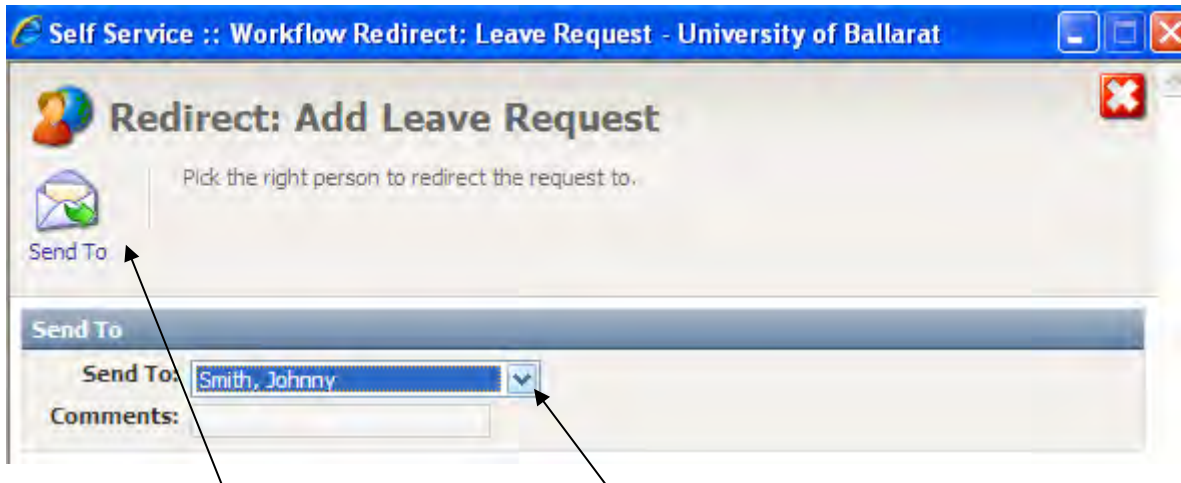
This option allows you to view the request in more detail and also view any other leave bookings the staff member may have booked earlier. (via the Absence Chart) Once the Supervisor/Manager has looked over the request in more detail, they can Accept the request, Redirect it to a different Manager for approval, Reject the leave, or Return the request back to the employee with a message advising them to make some amendments to the request.

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 you have approved it and it has been passed on. (The request is passed onto the Payroll team for final approval). Once payroll approves the leave request it will become a current booking.

Redirect button

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



If the 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 to.

Reject button

If you would like to reject the leave request for whatever reason, simply click on 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.

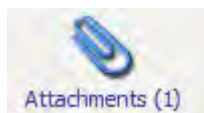


Return button

Managers also have the ability to Return the leave request back to the sender. There may be a number of reasons why they would do this for example, there is 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 ie. Medical Certificate, you are able to view the file by clicking on the blue paper clip (Attachments) button.



File	Size	Date Added	Title	Description
Jim's Medical Certificate - 4th June 2013.pdf	28kb	04 Jun 2013	Jim Parker - 4th June 2013 Sick	Medical Certificate for the 4th June 2013

To load up the attached file click on the file name highlighted in blue.