Charles Sturt University

Web Kiosk User Guide
Approving Leave Requests

Division of People and Culture

For further information please contact Employee Services

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Approving Request

1. When you log into Web Kiosk there may be leave requests waiting for approval. If this is the case you will see them listed on your 'To Do' tiles, as shown in the example below:

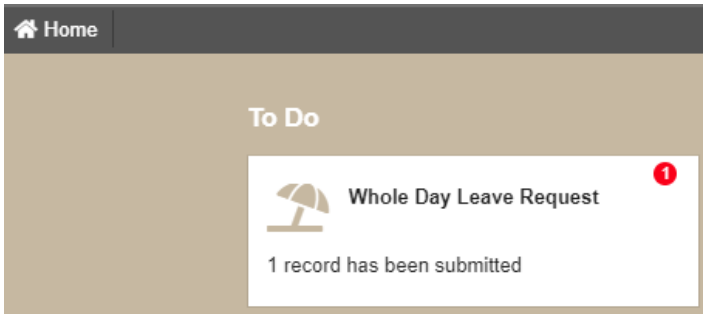


Figure 1: Landing Page 'To Do' tiles

Select the **Whole Day Leave Request** tile to go straight to approvals.

2. Alternatively, select **Home > My Approvals**

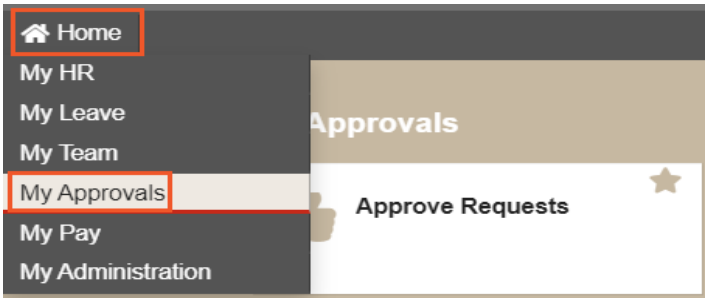


Figure 2: Home > My Approvals

In many cases the information displayed on the summary screen will provide sufficient information for you to make an approval decision. If this is the case, the request may be approved or rejected from the summary screen by clicking the relevant radio button and then clicking on the 'Update' button.

Escalation Period Definition

Part of the approval process is an automatic escalation period. Automatic escalation occurs if you do not approve or reject leave requests within seven days. A request will be escalated to your supervisor for approval after this period expires. It will then remain with that supervisor for another seven days. If the leave request still has not been dealt with, it will default back to People and Culture (DPC) for appropriate action.

This Approve Requests screen will list all requests that are awaiting approval grouped by transaction type. ie Part Day Leave Request, Whole Day Leave Request

Figure 3: Whole Day Leave Request

Via the Approve Requests screen it is possible to assign a request one of the following statuses:

Approval Status	Description
Rejected	Approval not given for this transaction. The employee will receive an email message and a screen prompt advising them that the booking was rejected. If rejecting a request, a comment may be entered. This comment will be accessible to the employee when they review the rejected record. **Please note**: Any transaction that is rejected will remain in the Team Members My Requests list until they decide to delete the transaction. This is done by accessing the record using the 'Pending Transactions' option and clicking the 'delete' button.
Approved	Approval is given for this transaction. The employee will receive an e-mail to confirm that their request has been approved.
Recommend Approval	The transaction is recommended for approval and is escalated to the next level approver. Email messages will be sent to the employee and the next level approver informing them of the escalation and recommendation.
Recommend Reject	The transaction is recommended for rejection and is escalated to the next level approver. Email messages will be sent to the employee and the next level approver informing them of the escalation and recommendation.
Escalated	Approval escalated to the next approval level. The escalated option allows the approver to escalate the request up to the next level of the approval's hierarchy for action. A comment should be added that can then be viewed by the next level approver. These comments will also be visible to the employee making the request.

Approvals should always be actioned from the record detail in the following circumstances:

- For leave requests where a warning message is attached since the warning message may only be accessed from within the detail record. The 'Approve' option will be blanked out (if the user hovers over the option an explanation will display.
- For sick leave requests when employees are recording the details of their Medical Certificates. The medical certificate details are only displayed on the detail screen along with the facility to tick that the certificate has been sighted.
- If rejecting a request and wishing to attach comments.
- If wishing to defer the approval decision of a leave booking.

To access the request approval detail screen, click on the Record Id. The detail screen appears as follows:

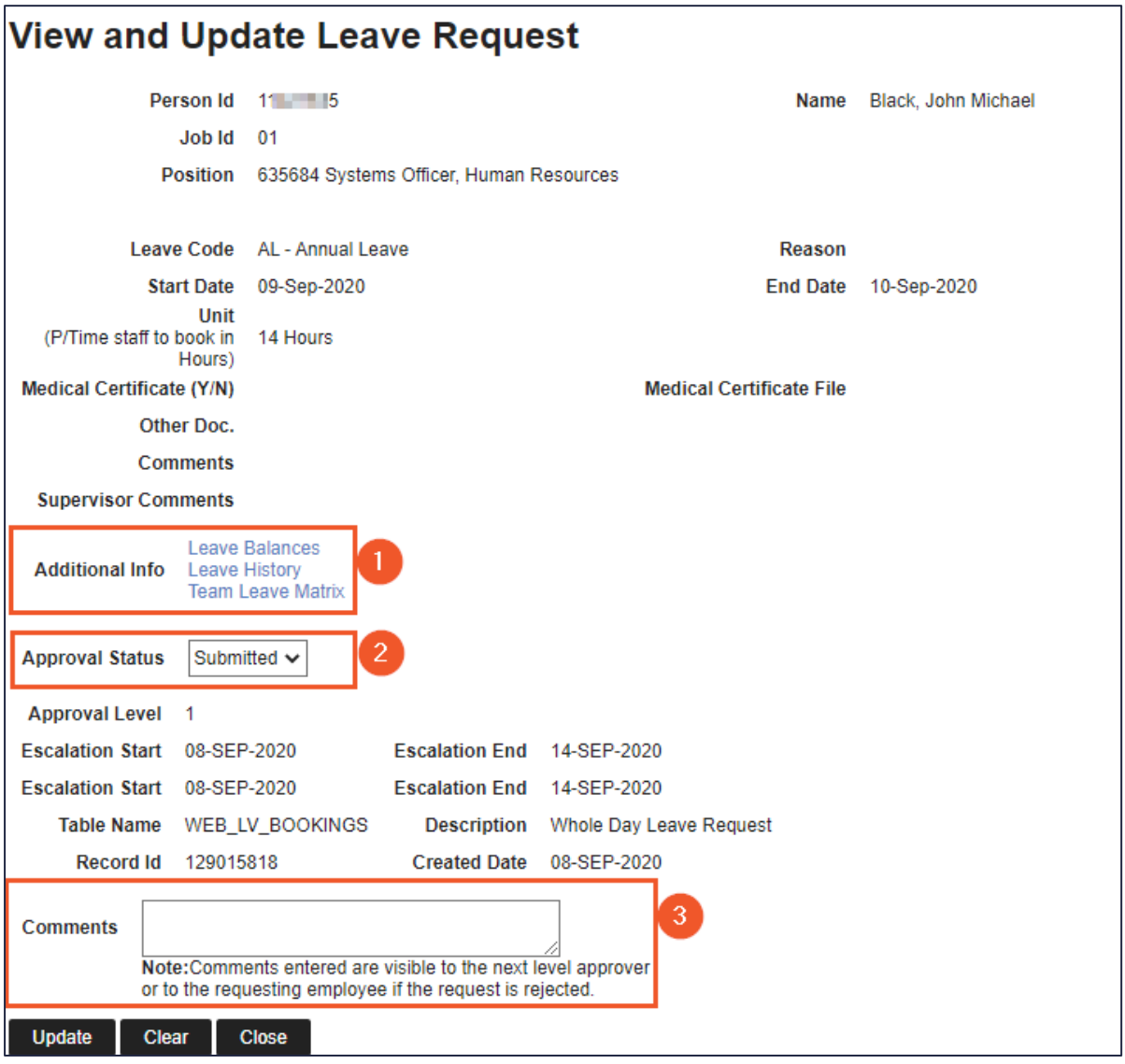


Figure 4: View and Update Leave Request

The full details of the leave request will be displayed including any warning messages that are attached in the case of leave requests.

The following information refers to the numbered boxes in Figure 4.

1. Additional Info Section

- Leave Balances – Displays the employee's current leave balances
- Leave History – Displays current leave bookings
- Team Leave Matrix – Displays the entire team's leave in a colour coded table.

2. Approval Status

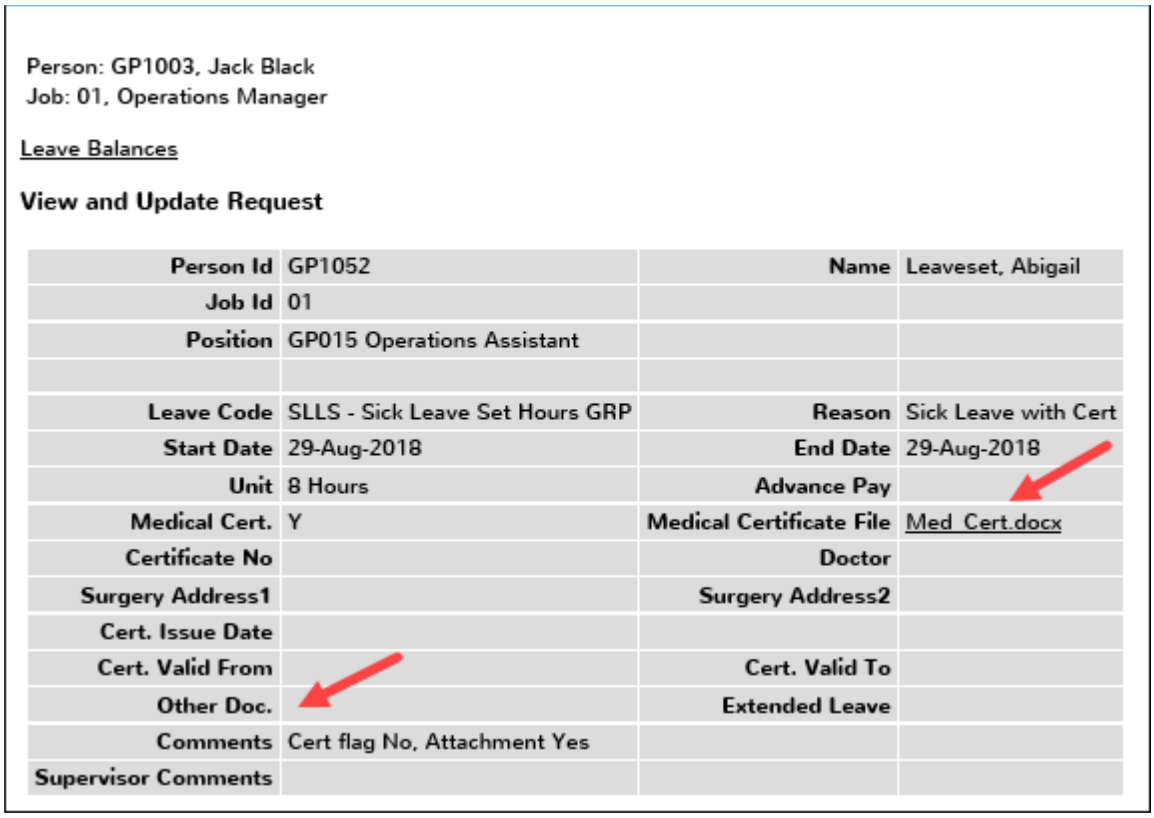
Within this screen it is possible to select the required action from the drop down list and full functionality is available.

Approving a request	**select 'Approved' from the drop-down list and click on the 'Update' button**
Rejecting a request	select 'Rejected' from the list, enter comments into the 'Comments' field and click on the 'Update' button. The comments will be attached to the request and will be available to the employee when they view the record.
Recommending for approval	select 'Recommend Approval' from the list, enter comments into the 'Comments' field if required and click on the 'Update' button.
Recommending for rejection	select 'Recommend Rejection' from the list, enter comments into the 'Comments' field if required and click on the 'Update' button
Escalating a request	select 'Escalated' from the list; enter comments for the benefit of the next level approver. These comments will also be visible to the employee making the request
Deferring a request	select 'Deferred' from the list and enter a reactivated date. It is possible to defer an approval decision on a leave booking until a later date by selecting the status 'Deferred' and entering the date it is to be reactivated by in the Reactivated date field. A 'Deferred' request may be approved, rejected or escalated at any stage. If no further action is taken before the reactivation date is reached, the normal escalation process will resume. **Please note:** It is not possible to defer a request that has already been escalated to another level, either manually or automatically.

The requesting employee will receive an e-mail to inform them that a request has been approved, rejected or deferred.

Leave Requests and Medical Certificate Details

Employees are required to enter Medical Certificate details for Personal (Sick) Leave more than 3 days, at the time of requesting the leave. If these details have been entered they will be displayed on the Approval screen as shown below.



Person: GP1003, Jack Black
Job: 01, Operations Manager

Leave Balances

View and Update Request

Person Id	GP1052	**Name**	Leaveset, Abigail
Job Id	01		
Position	GP015 Operations Assistant		
Leave Code	SLLS - Sick Leave Set Hours GRP	**Reason**	Sick Leave with Cert
Start Date	29-Aug-2018	**End Date**	29-Aug-2018
Unit	8 Hours	**Advance Pay**	
Medical Cert.	Y	**Medical Certificate File**	Med_Cert.docx
Certificate No		**Doctor**	
Surgery Address1		**Surgery Address2**	
Cert. Issue Date			
Cert. Valid From		**Cert. Valid To**	
Other Doc.		**Extended Leave**	
Comments	Cert flag No, Attachment Yes		
Supervisor Comments			

Figure 5: View and Update Leave Request

- If a Medical Certificate document has been attached, click on the **Medical Certificate Docx** link to view the certificate. Click the box to confirm that you have sighted the medical certificate before approving the record
- Click on the 'Update button' to save your response.

The requesting employee will receive an e-mail to inform them that a request has been approved, rejected or deferred.

When returning to the Summary list screen the Approval Status radio buttons will be greyed out for the record just actioned and no further action will be possible for this record.

You may continue to approve, reject or escalate other records from the summary screen or access the detail screen for other requests. Clicking on the 'Update' button on the summary screen before exiting the screen will ensure that all actions are saved.

Approval History

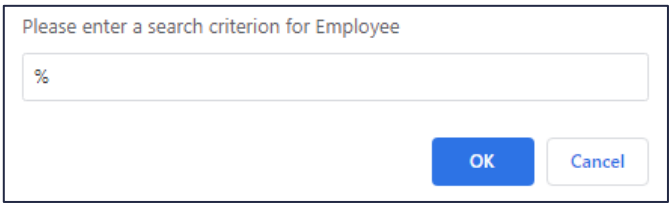
The Approval History screen allows approvers to view details of the requests that they have previously actioned including approvals and rejections.

1. From the **Home** menu, select **My Approvals**
2. Select **Approval History**

This will display the selection screen below:

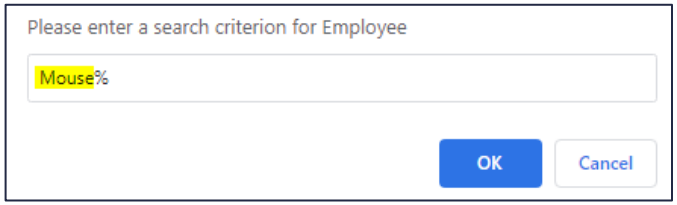
Select the records that you wish to display by selecting an employee and/or selecting to and from approval dates. If you check the 'Include Delegation' checkbox before executing your search, the results will include details of any approvals processed on your behalf by your delegates.

Clicking on the drop-down list icon will display a box as follows:



Clicking 'OK' here will display a list of all relevant employees.

Alternatively, a search condition may be entered, example:



Again, selecting 'OK' will display all records meeting the search criteria.

Having selected the required records a list of the requests will be displayed in the same format as the Approve Requests screen.

Approval History

Return to previous screen

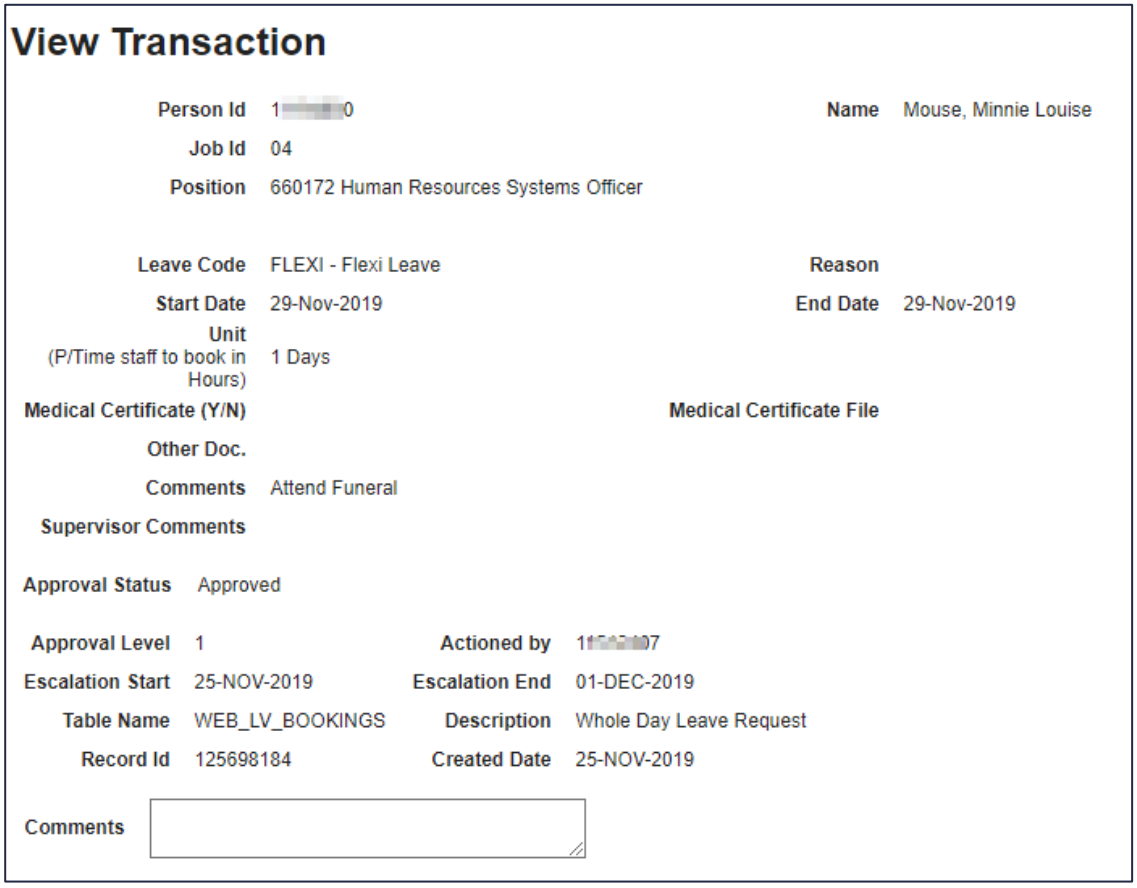
Whole Day Leave Request

Record ID	Name	Leave Code	Warning on Leave Request	Leave Start Date	End Date	Escalated to you By	Created Date	To Be Actioned By	Comments	Mgr Comments
2393225	Mouse, Minnie Louise	Personal Leave (Sick, Carers)		18-DEC-2020	21-DEC-2020		18-AUG-2020	24-AUG-2020		
2384940	Mouse, Minnie Louise	Annual Leave		18-JUN-2020	07-JUL-2020		16-JAN-2020	22-JAN-2020		
2288013	Mouse, Minnie Louise	Annual Leave		13-JAN-2020	27-JAN-2020		04-SEP-2019	10-SEP-2019		
2337899	Mouse, Minnie Louise	Flexi Leave		02-JAN-2020	03-JAN-2020		08-NOV-2019	14-NOV-2019		
2288033	Mouse, Minnie Louise	Flexi Leave		30-DEC-2019	31-DEC-2019		04-SEP-2019	10-SEP-2019		
2342403	Mouse, Minnie Louise	Flexi Leave		06-DEC-2019	06-DEC-2019		13-NOV-2019	19-NOV-2019		
2350968	Mouse, Minnie Louise	Flexi Leave		29-NOV-2019	29-NOV-2019		25-NOV-2019	01-DEC-2019	Attend Funeral	

Figure 6: Approval History

To view the details of the request, select the record id.

The detail screen will show the approval status along with any comments. The actioned by field will show the employee number of the person who approved the request so users can see which transactions have been approved by delegates.



View Transaction

Person Id	1[redacted]0	**Name**	Mouse, Minnie Louise
Job Id	04		
Position	660172 Human Resources Systems Officer		
Leave Code	FLEXI - Flexi Leave	**Reason**	
Start Date	29-Nov-2019	**End Date**	29-Nov-2019
Unit (P/Time staff to book in Hours)	1 Days		
Medical Certificate (Y/N)		**Medical Certificate File**	
Other Doc.			
Comments	Attend Funeral		
Supervisor Comments			
Approval Status	Approved		
Approval Level	1	**Actioned by**	1[redacted]07
Escalation Start	25-NOV-2019	**Escalation End**	01-DEC-2019
Table Name	WEB_LV_BOOKINGS	**Description**	Whole Day Leave Request
Record Id	125698184	**Created Date**	25-NOV-2019

Comments

Figure 7: View Leave Approval Transaction

Approval Delegation

The approval delegation facility allows an approver to delegate the approval of requests to another person or position within the organisation. All Web Kiosk requests may be delegated to the same person/position or alternatively different requests may be delegated separately, for example leave requests may be directed to one person and timesheets to another

The delegation may relate to a specific period e.g. to cover a short absence or may be open ended to cover longer periods.

When delegating approval access, the system will check whether the requests are directed to an approver by virtue of their position or their employee number and will prompt for the position or their employee number to delegate to accordingly.

When delegating all requests the system may find a mixture of position and employee type approval setups, e.g. leave bookings may be directed to the requester's team leader's position, whereas timesheets may be directed to a specific employee in in your business unit. In these cases, a message will be displayed informing the user that two delegation records will be needed, one to cover requests directed by position and one for those directed by employee number.

To delegate approval access, proceed as follows:

1. From the **Home** Menu, select **My Approvals**
2. Select **Approval Delegation**

This will display the screen below:

Figure 8: Approval Delegation Summary

Any delegations that have already been entered will be displayed as above, they may be changed by clicking on the 'Edit' link.

3. To add a new delegation record, click on the link **Add New Approval Delegation Record**.

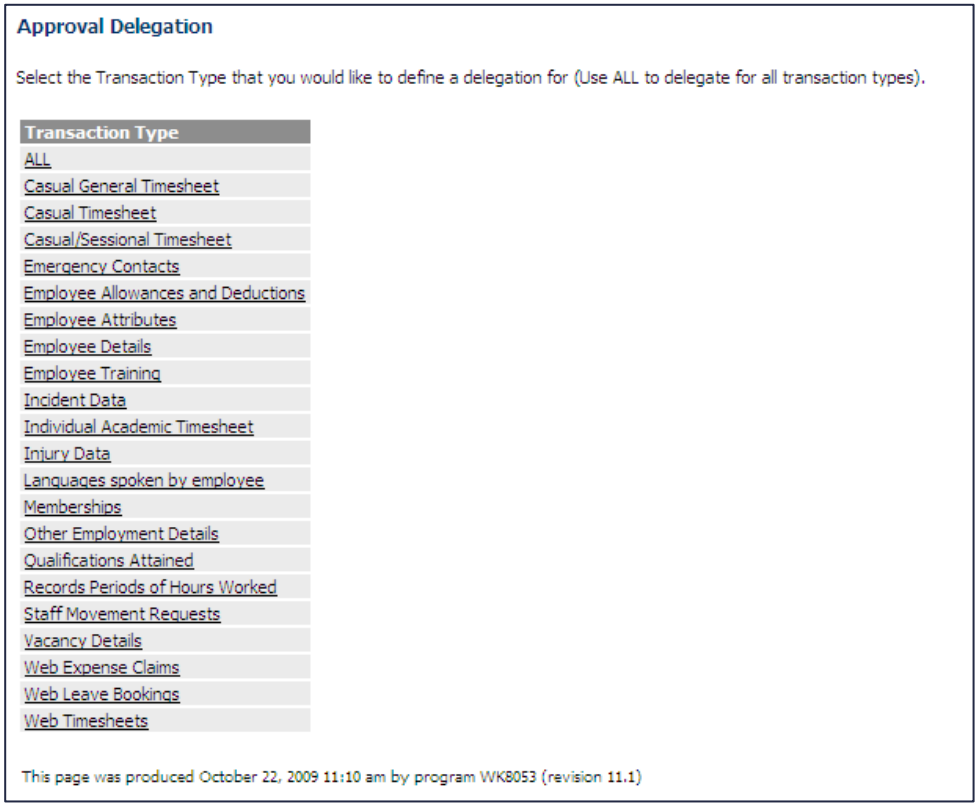


Figure 9: Approval Delegation Transaction Type Selection

4. Select the request type that you wish to delegate by clicking on the relevant link or click on ALL to delegate all requests regardless of the type.

   4.1 **Selecting *ALL*** as the transaction type will produce following screen. In this case you will need to define a delegation for both employee and position type approval.

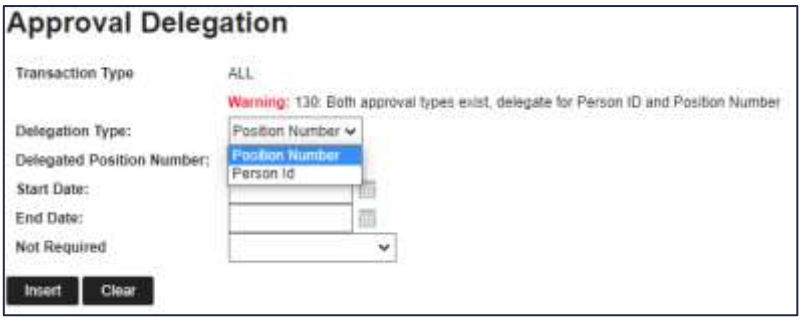


Figure 10: New Approval Delegation for Transaction Type ALL

There are two basic delegation types.

- E - Employee: Where delegation is defined using the approver's employee number and specifying the employee number of the delegated approver.
- P - Position: Where delegation is defined using the approver position number and specifying the position number of the delegated approver/approvers.

Only employee delegations will be applied to transactions sent to specific employee numbers for approval. They will not affect transactions specified to be approved by a position.

Likewise, only position delegations will be applied to transactions sent to positions for approval. They will not affect transactions specified to be approved by specific employees. Therefore, it may be necessary for both an employee type and a position type delegation to be defined in order to ensure that all requests are delegated correctly.

When a request is entered via Web Kiosk the process will check for the existence of delegation records at each approval level. This may result in one, or a chain, of delegations being detected. For example, approver A delegates to approver B who delegates to approver C etc. The request will be directed to the approver at the end of the chain.

4.2 **Selecting an individual transaction type** will produce the following screen:

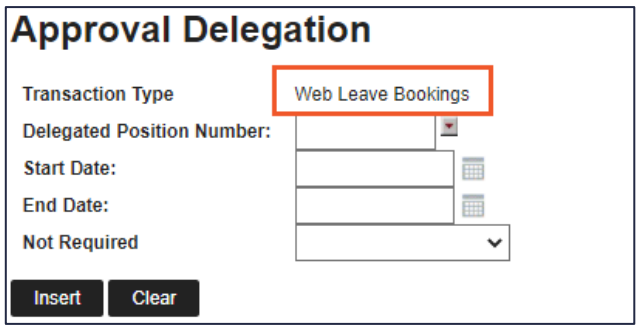


Figure 11: New Approval Delegation for Transaction Type Web Leave Bookings

In this case, you only need to define a delegation for the position type approval.

Completing the approval delegation form

- The first field may be labelled 'Delegated Position Number' or 'Delegated Person Id'
- Select the Position Number or Person Id (employee number) that you wish the requests to be delegated to. Clicking on the list of values (LOV) will provide a lookup allowing a search to be done by Position Title, Occupant, Clevel (Business Unit) and/or employment status as follows:

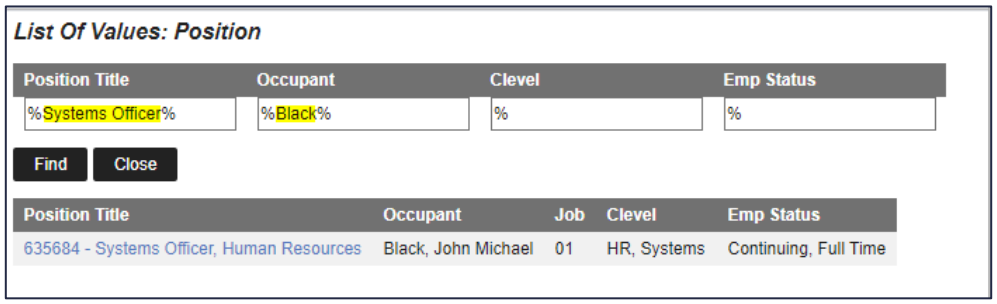


Figure 12: List of Values: Position

- Enter the date on which you wish the delegation to start.
- Enter the date on which you wish the delegation to end, if applicable.
- Save the record by clicking on the **Insert** button.

5. The record entered will be checked to ensure that it meets the following criteria:
    - That the end date is not before the start date.
    - The position delegated to is current at the start date and end date (if entered) of the delegation.
    - Employees are current for the duration of the delegation as above.
    - The record does not overlap an existing delegation record for the same request type.

Error messages will be displayed if any of the above validation checks fail.

If the record is saved successfully standard success message will be displayed as shown below. The screen display's the Transaction Type being delegated and the original approver's Position Number or Person Id.

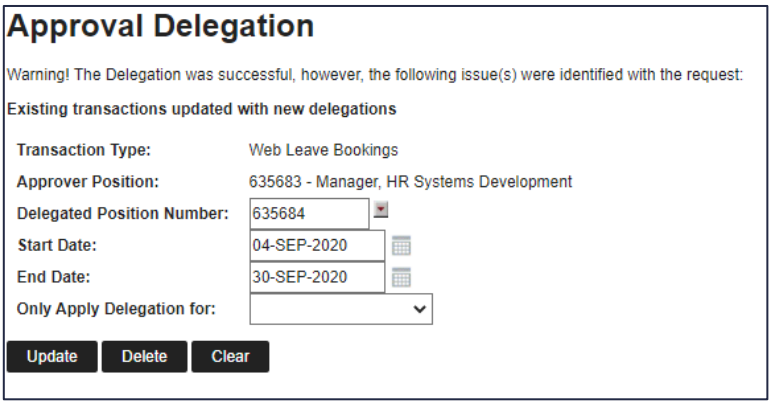


Figure 13: Approval Delegation Success

After the record is saved email notifications will be sent to all the occupants of the delegated position. Email notifications will be sent under the following circumstances:

- When a new delegation is processed through web self-service.
- When a previous delegate is updated with the new delegate.
- When either the start date or end date (or both) are updated for a delegation for the same delegate.
- When a delegation is removed from an employee position.

Please Note: In all the above cases, if the delegation is, or was, to a position all occupants of the position will receive email notification.

Delete Delegate Position

1. From the **Home** Menu, select **My Approvals**
2. Select **Approval Delegation**

Figure 14: Approval Delegation Summary

3. Select **Edit** on the relative delegation

Figure 15: Approval Delegation Details

4. Select **Delete,** then OK to confirm

Figure 16: Approval Delegation Deletion Success

The delegated employee, or all the employees in the delegated position will receive a notification email.

Team Calendar (Team Leave Matrix)

1. From the **Home** Menu, select **My Team.**
2. Select **Team Calendar**

The Team Calendar will provide a calendar view of your team and will include details of:

- Leave
- Public Holidays
- Non-Working days - derived by referencing the employee rosters

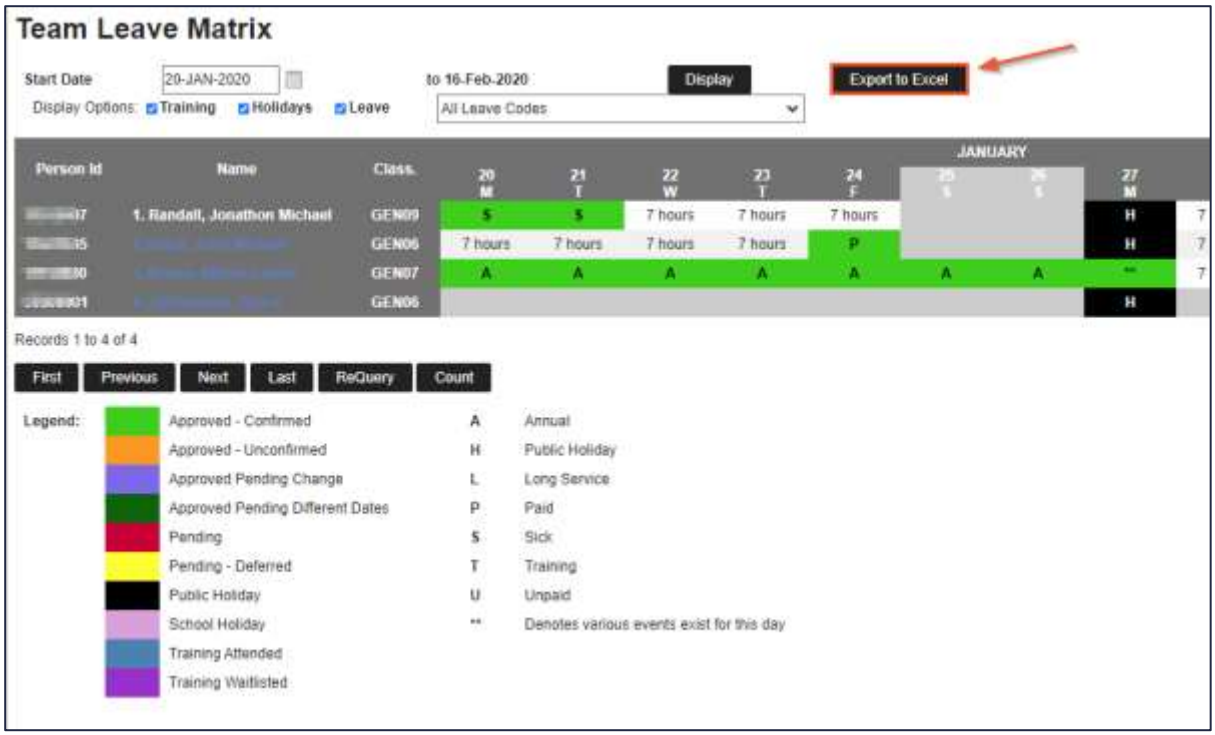


Figure 17: Team Leave Matrix

Exporting to Excel

Export functionality has been added to the Team Calendar. See Export to Excel button in Figure 17 above