Web Kiosk User Guide

Approving Leave Requests

Contents

1. Accessing Approvals

When the Web Kiosk opens, if you have pending leave requests to approve, a message will appear (in a **blue font**) on the right hand side, notifying you that you have records to approve.
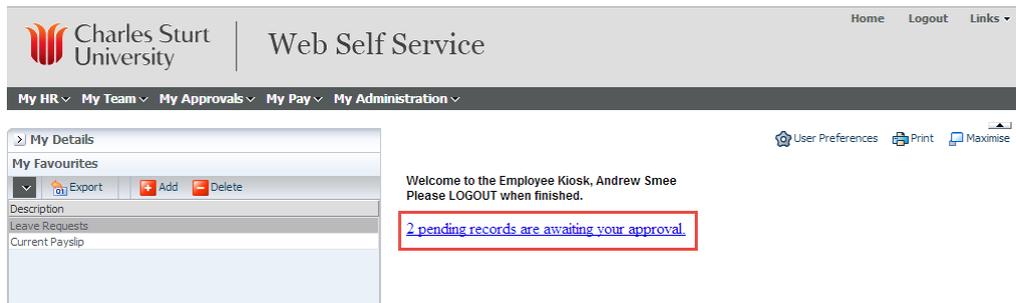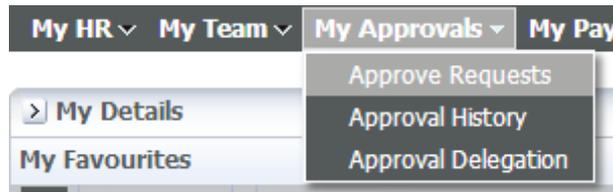

Figure 1-1

To approve/view leave requests either click on the message or click on the **My Approvals** menu then **Approve Requests.**

2. Approving Requests

Approving requests can be as simple as two-clicks of the mouse or through a more comprehensive method, which will display further information prior to approving. This section of the document will explain the options for approving leave requests.

Escalation Period Definition

Part of the approval process is an **automatic escalation period**. Automatic escalation occurs if you do not approve or reject an employee's leave request within seven days. The 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 Human Resources (HR) for appropriate action.

A. Approval Screen

When **Approve Transactions** is selected the **Approve Request** screen will appear (as Fig 2-1)
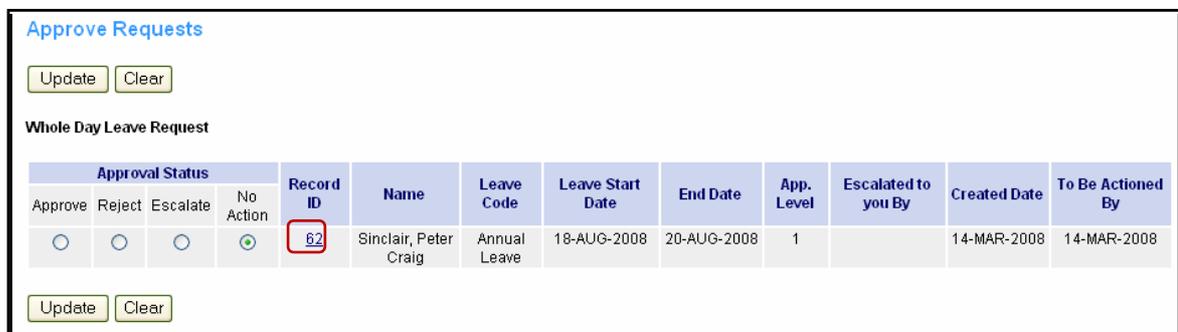

Figure 2-1

There are two methods of approval:

1. Simple
2. Comprehensive

B. Simple Method of Approval

The simplest way of approving leave can be performed here. From this screen you can simply **Approve**, **Decline/Reject** or **Escalate** the leave request. Then click **Update**. The employee will then be notified by e-mail of your decision regarding their leave. This record can then be viewed from Approval History in the Kiosk (Section 4 of this document).

No Action is the default approval status when first viewing the request. The leave request can only remain at this status level for a maximum of seven (7) days before it is escalated to the next level of approval. **NOTE**: If there is a Warning associated with the leave request, an extra column is added to the summary called **Warning on Leave Request**

Whole Day Leave Request

Approval Status				Record ID	Name	Leave Code	Warning on Leave Request	Leave Start Date	End Date	App. Level	Escalated to you By	Created Date	To Be Actioned By
Approve	Reject	Escalate	No Action										
○	○	○	◉	209	Sinclair, Peter Craig	Annual Leave	Y	15-APR-2008	15-APR-2008	1		22-APR-2008	22-APR-2008

Figure 2-2

To view the Warning click on the Record ID number (in Fig 2-2 the Record ID number is 209) then follow the instructions in Comprehensive Method of Approval in the following section.

C. Comprehensive Method of Approval

This method is a more comprehensive way of approving leave. On the **Approve Requests** form, if you click on the **Record ID** number (in this example it is **62 - on the previous page**) more detailed information about the leave request will be displayed in a new window (Fig 2-3). If there are any Warnings, they will also be displayed on this second screen (Fig 2-3).

Warnings will be displayed at the top the screen (see Fig2-3). Warnings include:
- overlapping leave requests (*ie* when a leave has been requested and there is already approved leave for the same date(s))
- No medical certificate has been supplied (when appropriate)
- Medical Certificates must be sighted by a supervisor before leave is approved. Certificates will be stored at the School, Divisional or Faculty level

*[**NOTE**: For definitions on Approval Status, please see section **2ii Approval Status** of this document.]*

Figure 2-3

The following information refers to the numbered boxes on Figure 2-3 above.

i. **Additional Info Section**

- **Leave Balances** – Displays the employee's current leave balances

- **Leave Booking Enquiry** – Displays current leave bookings

- **Team Leave Matrix** – Displays the entire team's leave in a colour coded table.

    [*NOTE*: The **Team Leave Matrix** is explained in section **4B** of this document]

ii. **Approval Status**

Approval Status is a drop-down list that the approver can change/set the approval, rather than using the buttons on the Approve Request.

Approval request options (Fig 2-1)	View and Update request options (Fig 2-3)
Approve	Approved
Decline/Reject	Declined/Rejected
Escalate	Escalated
No Action	Deferred
	Submitted

Approval Status	Description
APPROVED - Approval is given for this transaction	If the record is approved, the record will be transferred through to Alesco. The employee will receive an e-mail to confirm that their request has been approved.
DECLINED **-** Approval not given for this transaction.	If the declined option is chosen, the record will not be transferred through to Alesco. The employee will receive an email message and a screen prompt advising them that the booking was declined. If declining a request, a comment may be entered. This comment will be accessible to the employee when they review the declined record. **NOTE**: *Any transaction that is declined will remain in the Team Members 'Pending Transactions' list until they delete the transaction. This is done by accessing the record using the 'Pending Transactions' option and clicking the 'delete' button.*
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 approvals hierarchy for action. A comment should be added that can then be viewed by the next level approver. **NOTE**: **1.** *Requests will be escalated to the next level of approval if they have not been approved after seven (7) days.* **2.** *Requests may only be escalated once; they cannot be escalated again to the next level up.*
DEFERRED/NO ACTION - Approval decision deferred to a later 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, declined or escalated at any stage. If no further action is taken before the reactivation date is reached, the normal escalation process will resume. **NOTE:** *it is not possible to defer a request that has already been escalated to another level, either manually or automatically.* 'No Action' is the default status on the Approve Requests screen (Fig 2-1)
SUBMITTED	In Figure 2-3 under Approval Status, 'Submitted' means that the employee has submitted their leave request for approval.

Reactivation Date

The **Reactivation Date** is used in-conjunction with the **Deferred** option under **Approval Status**. If no further action is taken before the reactivation date is reached, the normal escalation process will resume. The reactivation date needs to be entered into the field in the DD-MMM-YYYY (eg 28-MAR-2008) format or selected through the calendar button .

iii. Comments

Relevant comments may be entered into the comments box.

Buttons

Click:

- **Update** to proceed and accept changes
- **Clear** to clear the comments box
- **Close** to close the window, without committing to the changes

3. Request Actioned (Approved, Declined or Escalated)

A. After Action

When a request has been approved by the supervisor:

i. You will see the successful action screen

ii. An email will be sent to the staff member who made the request, informing them their leave has been approved; declined; escalated or deferred until a specified a date

iii. The Leave Request will then appear in the supervisor's Approval History, along with any other Leave Requests, whether they were declined or approved

4. Approval History

A. Viewing previous approvals (including declined and reversed requests)

To view all approvals made as a supervisor choose **Approval History** from the **My Approvals** menu:
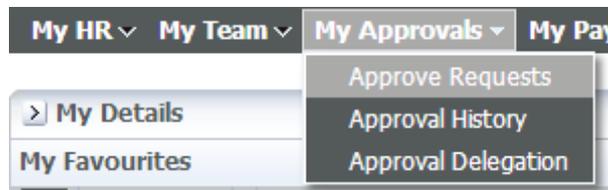
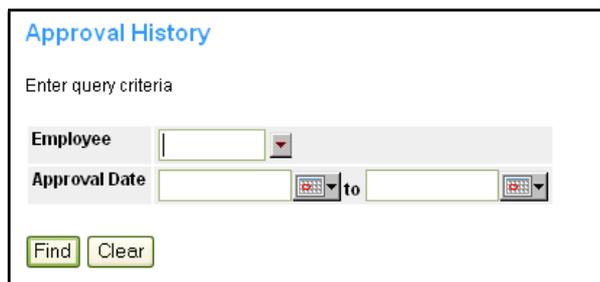After clicking Approval History, this screen will appear:

Figure 4-1

*[**NOTE**: It is a good idea to have the Employee Number of the staff member you want to assign the approval delegation to, prior to starting this process. This saves time searching for the number, during the process]*

From this screen you can:

- Choose an individual staff member (using their employee number) or if left blank, all staff members assigned to the supervisor will be selected. Alternatively, you can click on

the down arrow at the edge of the field and perform search for/by the Employee Number. When the search opens, click the **Find** button to view all Employees reporting to you. Click on the appropriate Employee number from the List that appears.

*[**NOTE**: depending on the number of staff, leaving the Employee field blank can return a large number of records and can take a while to process]*

- Select specific dates to search, eg between 01-Jan-2008 to 31-Jan-2008, or leave blank

Click the **Find** button to start the search.

Depending on the parameters entered, the supervisor should receive a screen similar to the picture in Figure 4-2. The page will display **Part Day** and **Whole Day Leave Requests**. It will also show leave that has been **reversed** under the **Leave Reversal** heading. **Reversed Leave** is any approved leave that has been requested to be reversed by the employee. Reversed Leave is subject to the approval process. Accordingly, the supervisor must approve the reversal. Once the reversal has been approved it will appear in the Leave reversal section of Approval History page for the specific employee. The employee will also receive an email.

Part Day Leave Request

Record ID	Name	Leave Code	Leave Date	No. of Hrs	App. Level	Escalated to you By	Created Date	To Be Actioned By
122	Sinclair, Peter Craig	Annual Leave	19-MAR-2008	4.3	1		19-MAR-2008	19-MAR-2008

Whole Day Leave Request

Record ID	Name	Leave Code	Warning on Leave Request	Leave Start Date	End Date	App. Level	Escalated to you By	Created Date	To Be Actioned By
62	Sinclair, Peter Craig	Annual Leave		18-AUG-2008	20-AUG-2008	1		14-MAR-2008	14-MAR-2008
101	Sinclair, Peter Craig	Annual Leave		07-MAY-2008	08-MAY-2008	1		17-MAR-2008	17-MAR-2008
32	Sinclair, Peter Craig	Annual Leave		08-APR-2008	11-APR-2008	1		03-MAR-2008	03-MAR-2008
8	Sinclair, Peter Craig	Annual Leave		19-MAR-2008	20-MAR-2008	1		22-FEB-2008	28-FEB-2008
11	Sinclair, Peter Craig	Annual Leave		19-MAR-2008	20-MAR-2008	1		22-FEB-2008	28-FEB-2008
116	Sinclair, Peter Craig	Flex leave		17-MAR-2008	17-MAR-2008	1		17-MAR-2008	19-MAR-2008
50	Sinclair, Peter Craig	Flex leave		14-MAR-2008	14-MAR-2008	1		12-MAR-2008	12-MAR-2008
26	Sinclair, Peter Craig	Annual Leave		12-MAR-2008	14-MAR-2008	1		03-MAR-2008	03-MAR-2008
20	Sinclair, Peter Craig	Sick Leave		04-MAR-2008	05-MAR-2008	1		03-MAR-2008	03-MAR-2008
119	Sinclair, Peter Craig	Annual Leave		15-JAN-2008	30-JAN-2008	1		18-MAR-2008	18-MAR-2008
53	Sinclair, Peter Craig	Flex leave		03-JAN-2008	03-JAN-2008	1		12-MAR-2008	12-MAR-2008

Leave Reversal

Record ID	Name	Leave Code	Leave Start Date	End Date	App. Level	Escalated to you By	Created Date	To Be Actioned By
125	Sinclair, Peter Craig	Annual Leave	18-JUN-2008	18-JUN-2008	1		20-MAR-2008	20-MAR-2008
128	Sinclair, Peter Craig	Annual Leave	13-MAY-2008	13-MAY-2008	1		20-MAR-2008	20-MAR-2008
131	Sinclair, Peter Craig	Annual Leave	07-MAY-2008	08-MAY-2008	1		20-MAR-2008	20-MAR-2008
134	Sinclair, Peter Craig	Annual Leave	20-MAR-2008	21-MAR-2008	1		20-MAR-2008	20-MAR-2008
110	Sinclair, Peter Craig	Flex leave	17-MAR-2008	17-MAR-2008	1		17-MAR-2008	17-MAR-2008

Figure 4-2

Further information on each record can be viewed by clicking on the **Record ID** number (red box in Figure 4-2). This will open a new window with further details, including any comments (Fig 4-3).
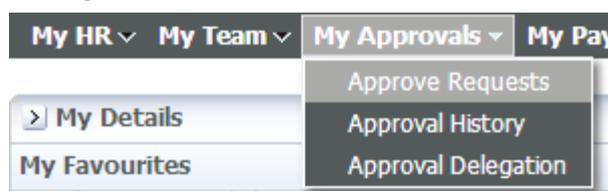
Figure 4-3

B. Leave Matrix

The Leave Matrix is a useful visual tool for supervisors. The Matrix shows the leave the staff have requested and booked, in a colour coded format.

The leave matrix can be accessed through **My Team** folder, then by clicking on the **Team Leave calendar**

This will show a list of staff members and any leave Approved, Booked or Pending. It will also show public holidays and training booked through the web kiosk.

Figure 4-4

If you want to view a different period, enter a new date into the **Start Date** field (Red Box on Fig 4-4). You can enter the date but typing into the field using the DD-MMM-YYYY format (eg 28-MAR-2008) or use the Calendar button [button] to select the date required. Then click the **Display** button and the Calender will update 28 days forward from the Start Date.

5. Approval Delegation

If the supervisor is unavailable, they can delegate their approval to another staff member during this period.

A. Assigning Approval Delegation

[**NOTE**: It is a good idea to have the Position Number of the staff member you want to assign the approval delegation to, prior to starting this process. This saves time searching for the number, during the process]

The supervisor has the ability to assign a staff member (using their position number) to approve leave requests during their absence. This is achieved under the **Approvals** folder and then clicking **Approval Delegation.**

Once the Approval Delegation option has been clicked this screen will appear:
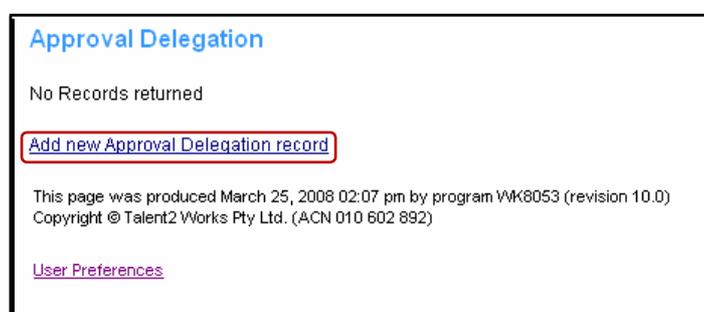
Figure 5-1

- The screen will look like this if delegations have not been set up previously.

- To setup a new delegation click on the **Add new Approval Delegation record** link (red box in Fig 5-1). Then choose **Web Leave Bookings** from the list that appears (Red box in Fig 5-2).
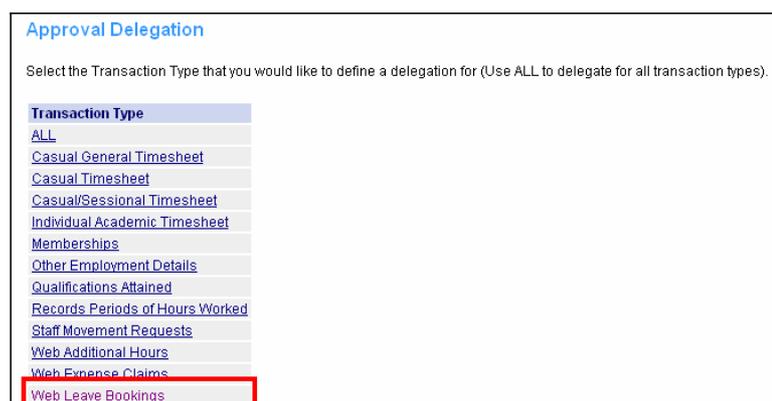

Figure 5-2

The Approval Delegation form will appear:

Figure 5-3

1. Enter the Number of the position receiving the Approval Delegation into the **Delegated Position Number** field. Alternatively, click on the down arrow at the edge of the field to perform search for the position. When the search form opens:

   a. Enter the employee's Surname in the Occupant Field, between two wildcard symbols Eg %Smith%

   (Percentage sign (%) is a wildcard. A wildcard is a tool that allows you search using partial information. This means you can perform a search when you only have part of a name. If you have wild card after the partial name, the search will find everything that matches eg Sm% will find names starting with "Sm" like Smith and Smyth. The Wildcard can be placed at the start for the partial name too eg %ith. This will find names ending in "ith" eg Smith. Also, you can place a whole name between two wildcard and only that particular name will be displayed %Smith%).

   b. Click the **Find** button. A list if staff members with that surname will appear. The click on the appropriate position number from the list.

   c. Alternately, click **Find** with only Wildcards in the fields (Position Title; Occupant; Clevel and Emp Status), all position numbers will display.

      i. You can also search using the other fields on the form, if you have the relevant information.

2. Enter the Start Date (the first day you will be away).

3. Enter the End Date (the last day you will be away).

4. Click **Insert.**

If the Delegation is successful, this screen will appear:

If this record is incorrect you can change the information by clicking **Update**.

If invalid information (eg a Position Number that is not assigned to this supervisor) is entered, you will receive an error message.

B. Edit or Update Delegation

The record will also be updated on the **Approval Delegation** screen (Fig 5-3). From this screen you can also Edit or Update any of the available records, by clicking **Edit** (Fig 5-5):

Figure 5-5

When **Edit** is clicked the following screen will appear and you can change the dates for which the delegation will apply:

Figure 5-6

The Entire record can be deleted by clicking on the **Delete** button.

DOCUMENT CHANGE CONTROL

This is a 'controlled' Document. The document history is:

Issue	Date	Amended By	Authorised	Release
Version 1.00	25-Mar-08	Peter Sinclair		
Version 2.00	26-Mar-2014	Andrew Smee		