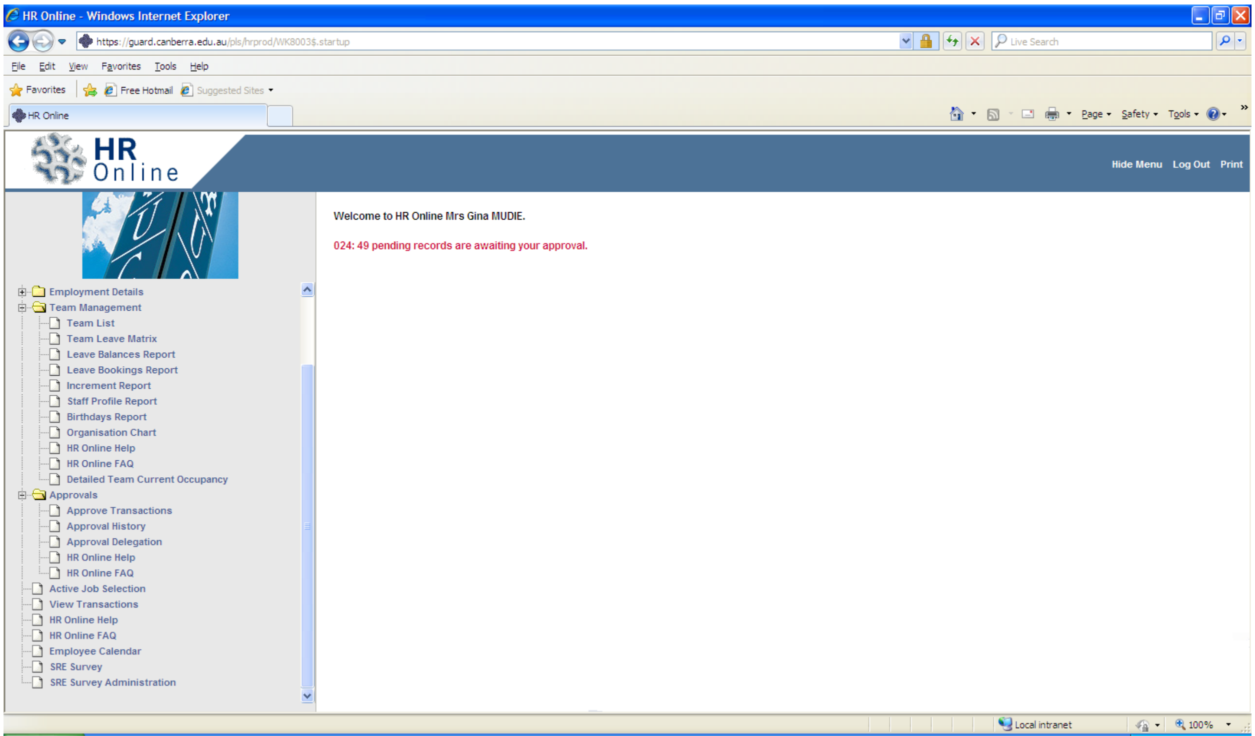
HR Online TEAM MANAGEMENT and APPROVALS

The Team Management and Approvals menus are available only to staff who are identified as Team Leaders. Team leaders are classified as staff who have other staff reporting to them in terms of leave, or who has the delegation to approve leave.



Team List

The Team List is accessible by clicking on the Team List menu item. The team list allows you to view staff immediately reporting to you.

Team Leave Matrix

The Team Leave Matrix allows a Team Leader to quickly and easily view team and leave requests (Approved and Pending) as well as determining the type of leave. This function allows for a Team Leader to gain greater control and understanding of their team and leave in their team. Selecting the Team Leave Matrix from the menu will show a list of all current staff reporting to you and their leave bookings.

The Team Leave Matrix will populate with information including the staff members ID, Name and days for which leave has either been approved or requested.

The Legend at the bottom of the page explains the colour system (whether the leave is; "Approved – Confirmed", "Approved – Unconfirmed", "Pending Leave Requests", "Pending Leave Requests – Deferred".). The lettering denotes the type of leave (Annual, Long Service, Paid, Sick, Unpaid).

Using the Menu at the top of the page the team leader is able to view the Leave Matrix by selecting a start date (Matrix shows a period of a month by default) or by particular leave code.

To view the Team Leave Matrix for any given start date select the start date and click the display button.
To view the Team Leave Matrix by a particular leave code select the code from the drop down list and click the display button.

Team Leader Reports

All of the team leader reports work in the same manner. First select the required report, then complete the parameter screen completing as much detail as required to refine your query and then click on the Find button:

- **Leave Balances Report**

The Leave Balances Report allows a Team Leader to quickly analyse leave balances for staff who report to them. Clicking the Leave Balances Report on the main menu will take you to the following page.

The leave balances can be run for a selected leave code or by entering in the leave description.

Clicking the Find button will run the leave balance report.

- **Leave Bookings Report**

The Leave Bookings Report allows for a Team Leader to view all leave bookings for their team for a given period or by leave code.

The date fields of the leave booking report are driven by calendars.

The Leave Code field is driven by a lookup.

Once the relevant dates have been entered pressing the find button will run the report.

- **Increment Report**

Reports the increment dates for the current team members with parameters to select the type of increment and date range.

- **Staff Profile Report**

The staff profile report allows a Team Leader to view all current staff reporting to them and restrict the report by the Employment Status Code, Employment Status Description, Classification Code or Classification Code Description. The Employment Status Description and the Classification Code Description are both free text fields and can have anything entered for search.

The Employment Status Code is driven by lookup. Clicking on the arrow will show all available Status Codes that can be selected.

The Classification Code is driven by lookup. Clicking on the arrow will show all available Status Codes that can be selected.

Once either the Classification Code or the Employee Status code has been selected then the report can be run by pressing the find button. Pressing the Clear button will reset all fields on the current form.

- **Birthdays Report**

Enter a date range for the birthday records you wish to report on or leave the dates blank to select birthday records for all of their team members. Once the Parameter screen has been completed Click on the Find button to retrieve the report.

Organisational Chart

The organisational chart gives a physical representation of what the University of Canberra's position structure and reporting structure looks like. Team Leaders can use this function to ensure that all relevant staff are reporting to them. To use the Organisational Chart select the Organisation Chart link on the main menu.

By default the Organisational Chart will start at position 10001 which is the top of chart position for the University of Canberra (Vice Chancellor's position). The number of levels the Organisational Chart will drill down to is defaulted to 3 levels.

If the Start Position Number is known then it can be entered directly into the box, alternatively the Start Position Number is driven by a lookup which can be accessed by clicking on the associated arrow. A list of all available positions are shown.

As the Position Structure often changes, an "effective" date can be selected. This allows the Team Leader to view the current Position Structure or the structure at any given historical time. The effective date field is driven by a calendar lookup.

The Include Casual field indicates whether Casuals should be shown within the Position Structure.

Note: Please do not overuse this function starting at the top level as it places a heavy load on the University of Canberra systems.

Once the fields have been entered clicking the Display button will show the Position Structure.

To expand on the selection click on the "+" which will drill down another level further.

To minimize the view click on the "-"which will drill up a level.

At any point clicking on the title of a position will show the positions details in the second pane.

The pictures within the organisational structure represent two types of staff.

	Black, with a “+” or a “-“icon next to it. Team Leader who has staff reporting to them.
	Blue, with no icon next to it. Staff at the lowest level within the structure and have no one reporting to them.

Clicking on any of the pictures next to the titles will automatically make the position the top of chart.

Detailed Team Current Occupancy

Reports team occupancy details including organisational unit, effective date, reason, agreed salary and occupancy percent

APPROVALS

The HR Online approval process is based on transaction types, with one or more persons nominated to approve the transaction.

- Teams are determined by the ‘reports to’ field in Positions
- The approval officer is based on the person occupying the position above that of the person to whom the transaction relates
- To ensure that every person in an organisation has at least one approval officer, a minimum of one officer must exist as a default. HR Online is setup to have 2 approval officers, 3 levels of escalation.
- Where there is more than one officer for an approval type, the approvals will normally occur in the order of the approval level specified against each officer for the team.
- If an officer does not approve or reject a transaction within a specified period of time (7 days), the approval level will escalate and the next approval officer will be able to continue the process.
- If the final officer fails to approve or reject a transaction within the specified time defined in the system, the transaction will be passed to the default approval officer for finalisation.
- If the person initiating the transaction is an approval officer, an organisation can choose whether the person will be able to approve their own transactions or whether the transaction will automatically move to the next approval level.

Approve Transactions

Select ‘Approvals’ from the main menu and then select ‘Approve Transactions’ from the sub-menu. The Approve Requests screen will be displayed. This screen will list all of the requests that are awaiting approval grouped by transaction types: Part Day Leave Request and Whole Day leave Request.

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

- **Rejected:** Approval not given for this transaction.

If the rejected 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 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 'Pending Transactions' 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.

If the record is approved, the record will be transferred through to Alesco (either automatically or in batch depending upon settings). The employee will receive an e-mail to confirm that their request has been approved.

- **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.

Please Note: Requests may only be escalated once; they cannot be escalated again to the next level up.

- **Deferred:** Approval decision deferred to a later date (leave requests only)

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.

2. 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 relevent radio button and then clicking on the '*Update*' button that appears at both the top and the bottom of the screen.

3. View and Update Request Screen

In a number of cases it will be necessary to access further details of the record and gain access to the full array of recording options e.g. the facility to record comments for rejected requests etc:

1. To access the request approval detailed screen click on the link in the Record Id column.
2. The full details of the record will be displayed including any warning messages that are attached in the case of leave requests.
3. 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.

Escalating a request – select 'Escalated' from the list; enter comments for the benefit of the next level approver. These comments may also be visible to the employee making the request, unless the CON_DEF - HIDE_COMMENTS_IN WK8023 is set to Y.

Deferring a request (Leave only) – select 'Deferred' from the list and enter a reactivated date as follows:

The leave request owner will receive an e-mail to inform them that a request has been approved, rejected or deferred. They will also be informed of the status of requests when they log into the kiosk main menu.

Personal Leave Requests and Medical Certificate Details

When do I need a Medical Certificate? Answer: You must provide a Medical Certificate certified by a Medical practitioner when you are on Personal Leave for 3 consecutive working days or longer.

For sick leave requests where employees have stated that a Medical Certificate is provided the Summary list screen shows the Approval Status radio buttons is greyed.

Click on the Approved and Update button on **View and Update Request Screen.**

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

Long Service Leave, Half Pay Leave, Leave Without Pay and Recreation Leave Enhancement

Due to the approval process of these type of leaves, manual leave applications are required to be completed and approved by your Team Leader. The application is then forwarded to Human Resources for processing.

The manual leave application can be down loaded at http://www.canberra.edu.au/hr/forms/leave.

Approval History

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

Select 'Approval History' from the 'Approvals' sub menu. Select the records that you wish to display by selecting an employee and/or selecting to and/or from approval dates.

Approval Delegation

The approval delegation facility allows an approver to delegate the approval of requests to another member of staff or position within the organisation. HR Online leave requests may be delegated to another position. The delegation may relate to a specific period of time e.g. to cover a short absence or may be open ended to cover longer periods.

To delegate approval access, proceed as follows:

1. Select 'Approval Delegation' from the 'Approvals' sub menu.
2. 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',
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.
5. The first field is labelled 'Delegated Position Number'.
6. Enter the Position Number that you wish the requests to be delegated to.
7. Enter the date on which you wish the delegation to start.
8. Enter the date on which you wish the delegation to end, if applicable.
9. Save the record by clicking on the ADD button. 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 and the screen will also display the Transaction Type being delegated and the original approver's Position Number

Once saved delegation records are listed on the initial screen and may be changed by clicking on the Edit link

View Transactions

A transaction is any claim or request you have made via Web Self Service. From time to time you may wish to view the transactions that you have made. Only transactions that are currently 'pending', i.e. have not been approved and transferred to Alesco may be viewed via this screen.

Once displayed, transactions that are no longer required, or have been rejected by the approver may be deleted.

To view/update Pending Transactions

1. Select 'Pending Transactions' from the Systems Settings menu.
2. This will display all pending transactions. The Approval Status of each of the requests will be displayed, this will indicate whether a request has been approved but is still waiting to be transferred, whether it has been rejected or is still pending approval.
3. To view the details for a particular pending transaction, click on 'view' for that record.
4. This will display the details of the transaction
5. To delete a transaction which has not been approved, either click on the delete check box from the summary list or click on the link for the 'Record Description' and you are able to delete the record by clicking on the 'Delete' button.
6. You will be prompted to confirm the deletion, after which the record will display as deleted.
7. If a transaction has been rejected by the Approval Officer then comments will be available for viewing
8. Rejected records may be deleted by clicking on the delete button, in which case a message will be received confirming the deletion.
9. Alternatively you may wish to retain the record on file for future reference, in which case the 'Viewed Comments' should be checked. This will ensure that you are not reminded again to read the comments on entering the Kiosk menu.

Please Note: All rejected transaction/s will remain in the View Transaction table until deleted by the Team member who created the transaction.