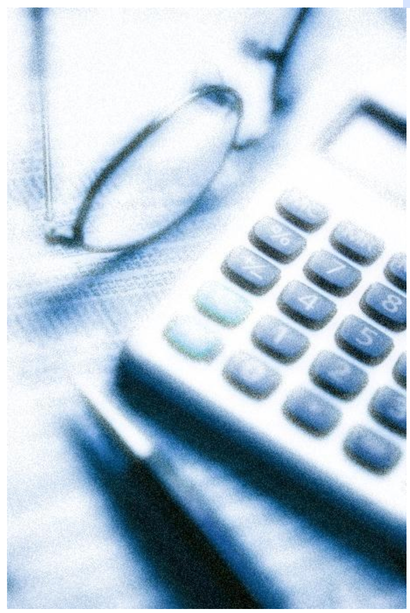
EmployeeVu
Administrator Guide



Version 2012

http://www.employeevu.com

contents

overview

About this guide

This guide is designed for administrative personnel who will configure and maintain EmployeeVu system options, organizational policies and employee records.

About the software

EmployeeVu is a workflow application designed to automate common administrative activities for employees, managers, and administrative personnel.

- Tracking leave accruals and balances
- Submitting leave requests and managing approvals
- Planning and publishing work schedules, including flex work and telework schedules
- Managing employee demographics and directory information

getting started

About logging in and out

EmployeeVu uses the same Windows credentials that you use to log in to your network. If you're using Microsoft Internet Explorer, you will not typically need to enter your credentials. Likewise, there is no special way to "log off" of the application – just close the browser window.

About the default System Administrator role

When you first log into EmployeeVu, you may be logged in as the default System Administrator. This is a special built-in account used when an administrator does not yet have a personal employee account defined in the system.

The System Administrator account can only access administrative functions. For example, it cannot be used to view or submit leave requests. You will notice a number of the main menus are disabled when logged in using this account.

What to do first

Before you start adding employee information, there are a number of configuration steps required to ensure the system is set up for your organization. See the next page for first-time guidance.

quick start

Before adding employees

Below is a list of the most important configuration options and the suggested order in which to configure them before you start adding employees.

Step	Option	Important	Page No.
1	System Settings	The **System Start Date** determines when accrual calculations begin	9
2	General Settings	The **Service Years** option determines how employee service years are calculated	10
3	Calendars	Employees must be assigned to a calendar	16
4	Leave Types	Customize the leave types for your organization	17
5	Employee Categories	Customize employee categories and related accrual policies for your organization	19
6	Work Schedule Policies	Customize work schedule policies for your organization; note the importance of **Rate Factor** for part-time schedules	21

Migrating to EmployeeVu

For organizations migrating to EmployeeVu:

- It is important to understand the relationship between the **System Start Date**, an employee's **Company Start Date**, and time credit **Effective** dates when migrating existing employee records to EmployeeVu. For a detailed explanation, see page 29.

- Employees can be added manually or they can be imported. Import instructions can be found on page 40.

general navigation

Administration menu

All administrative options can be accessed through the **Administration** menu and its submenus.

System options checklist

The general system options page can be accessed using the **Options** item on the **Administration** menu. This page includes an ordered list of major configuration areas. It is recommended that you configure the system options in the order presented.

You can use the setup checkboxes to track which items you have completed. You can reset all of the setup checkboxes or toggle their visibility at any time using the options presented in the **On This Page** panel.

Breadcrumbs

Most pages display a series of contextual links (called "breadcrumbs") near the top of the page. Use the breadcrumbs to navigate to a parent page in the application.

system settings

SMTP settings

The SMTP settings are required for sending email alerts. Your technical administrator should enter or provide these settings.

1. Enter the **Host**; this is typically the DNS name or IP address of the SMTP server
2. Enter the **Port** number; the default is usually port 25
3. Optionally check **Use SSL** if using an SMTP server configured for SSL (TLS)
4. Enter the **System Address**; this address will appear on the From line of emails that are not sent from a specific user
5. Optionally check **Use credentials** if credentials should be used
6. Optionally check **Use default credentials** to use the credentials of the process identity under which the application is running
7. Enter a **User Name** if you're using a specific set of credentials
8. Enter a **Password** if you're using a specific set of credentials
9. Confirm your **Password** if you're using a specific set of credentials
10. Enter the **Error Address**; this address will be used to send alerts about any unexpected errors logged by the system
11. Optionally check **Send error emails as high priority**
12. Click **Save & Send Test Email** to save and test your settings

System dates

The systems start and end dates control the earliest and last dates which for which users can modify any data. The **Start Date** also determines the date on which accruals begin for imported employees. Do not unnecessarily increase the **End Date** manually as this may decrease system performance under some circumstances.

Working days

For many organizations, Monday to Friday are considered working days by default. You can modify which days are considered working days by default by checking them or unchecking them.

Don't forget to click **Save** when you're done making changes. Saved changes take effect immediately.

general settings

Global preferences

Global preferences affect display options throughout the application.

1. Select a **Locale**; this determines date and number formats
2. Select the **First Day of Week**; this determines the first day of the week shown on all calendars through the application
3. Select the **Name Format**
4. Select a **Service Years** option; this determines how service years are calculated
    a. **Calendar year**. Service year calculations are based on the year only, as if all employees started on January 1; projected year-end balance calculations refer to the *end of the calendar year*
    b. **Employee's anniversary**. Service year calculations are based on the employee's specific start date; projected year-end balance calculations refer to the *last day before the employee's next anniversary*

Features

You can enable or disable specific application features for your organization.

1. Check **Enable Demographics** if you want employees to be able see and edit their own demographic data
2. Check **Enable Directory** if you want employees to be able to browse basic directory type information about other employees
3. Check **Enable Org Tree** if you want employees to be able to browse the organization tree
4. Check **Enable Leave Alerts** if you want alerts to be sent in response to leave request related workflow actions
5. Check **Enable Schedule Alerts** if you want alerts to be sent in response to scheduling related workflow actions

Workflow alert CC recipients

You can specify one or more email addresses that should be CC'd on alerts sent as the result of specific workflow transitions. For example, you can CC an HR administrator each time an alert is sent for a leave request approval.

1. In the **CC Recipient(s)** column, enter one or more email addresses (separated by semi-colons) that should be CC'd for the specific workflow transition

Special alert recipients

Some special alerts can optionally be enabled for specific events.

1. For **New Employee**, enter one or more email addresses (separated by semi-colons) that should receive an alert when a new employee is added
    a. A common use for new employee alerts is to notify your IT administrator when a new employee is starting; this will allow them to perform any necessary IT provisioning, including the entering of new employee network credentials into EmployeeVu
2. For **Demographics**, enter one or more email addresses (separated by semi-colons) that should receive an alert when demographic data is edited

Next employee number

You can manually set the next employee number to be used by the employee number generator. Note that the employee number generator will automatically increment the employee number when adding an employee if the number is already in use.

Don't forget to click **Save** when you're done making changes. Saved changes take effect immediately.

customization

Contact information

You can enter contact information that will appear on the **Contact** page. This page is accessible to users from the **Help** menu.

Agreement text

If you want agreement text to appear when employees submit leave requests, enter it into the **Agreement Text** box.

Field lists

You can customize which fields appear in various list views throughout the application by checking or unchecking the field names.

Don't forget to click **Save** when you're done making changes. Saved changes take effect immediately.

local resources

About local resources

Local resources are links to information resources specific to your organization. These links will appear on the **Resources** submenu of the **Help** menu.

For example, you might want to provide employees with links to local policy documents or web sites.

Managing local resources

You can add, edit and delete local resource links.

- **Description** is the name that will appear on the **Help** menu
- **URL** is the actual link
- **Sort Position** determines the order in which items will appear in the menu

important time based options

About time based options

Some options and policies can be assigned to employees using effective dates. This allows you to transition an employee's options over time without losing any historical information.

Time based options include:

- Calendars
- Employee categories
- Work schedule policies
- Telework policies

Since these options drive critical application behavior, you must be careful when making changes to established time based options.

> The effects of policy changes are immediate and retroactive. If you are changing established policies, you should create new policies and assign employees to the new policies as of a specific date rather than modify the existing policies. This will leave all past data intact.

Detailed information about each option can be found later in this guide.

departments

About departments

Departments can be used to organize employees. Department information can be used to filter employees and employee data in various views throughout the application.

Departments also determine which employees a Department Administrator can help manage.

Managing departments

You can add, edit and delete departments. You cannot delete a department that is being used by other records (such as employees).

- The **Active** flag determines whether you can select the item in other parts of the application; you can deactivate an item to retire it without deleting it

calendars

About calendars

Calendars determine which days are considered office closures, such as holidays. A calendar is typically associated with a geographic location since holidays are often different from location to location. If you have employees working in different states, provinces or countries, calendars let you define a separate schedule for each area.

Employees can be assigned to different calendars over time using effective dates.

> Employees must be assigned to a calendar, and that calendar must be published for the year(s) in which the employee will be modifying data

Managing calendars

You can add, edit and delete calendars. You cannot delete a calendar that is being used by other records (such as employees).

- The **Active** flag determines whether you can select the item in other parts of the application; you can deactivate an item to retire it without deleting it

Editing and publishing calendar years

You can add calendar years and publish them individually. A single calendar year is comprised of a list of office closures for that year.

1. From the **Calendars** page, in the **Years** column click **Add Year** for a calendar
2. Select the year you will be adding
3. To copy office closures from a previous year or another calendar, select the calendar and year.
4. Click **Save**
5. Add office closure dates and optionally specify working time on those dates
6. When you're ready, click **Publish Year** to publish the office closure dates
7. Click **OK** to confirm

leave types

About leave types

Leave types are used to categorize time that an employee spends on leave and to define related policies. You can define separate leave types for different calendars, which are typically associated with a geographic location that may have different rules.

Managing leave types

You can add, edit, and delete leave types. You cannot delete a leave type that is being used by other records (such as leave requests).

- **Accrual Type** determines if and how time is accrued for the leave type
    - **Daily**. The leave type accrual is calculated on a daily basis; choose this option for leave types that are based on the number of days the employee works and for which they are paid (i.e. vacation, typically)
    - **Annual**. The leave type accrual is calculated on an annual basis; choose this option for annual lump sum allocations of time (i.e. illness, often)
    - **None**. The leave type does not accrue; choose this is option when you will only track the time

- The **Is Restricted** flag restricts access to the leave type to administrative personnel only. When enabled, regular users cannot select the leave type when submitting a request. This may be useful for extended leave types.

- **Is Paid Leave** determines if employees accrue time for other leave types that use daily accruals when they use this time type. For example, if an illness leave type is not paid and your vacation leave type is accrued daily, an employee will not accrue vacation while on an unpaid illness leave.

- **Is Illness** is used by the application to determine which leave types are specifically for illness. This is used to detect when all available illness time has been consumed and then to allow substitution using other leave types while still tracking them as illness time. For example, if an employee has used all available paid sick days, you may allow them to use paid vacation time for illness purposes, but you'd like to track that the vacation is actually being used for illness. To do this, ensure that paid illness leave type(s) have the **Is Illness** flag checked.

- **Payroll Code** will be used in the payroll processing exports to categorize the leave type.

Leave type accrual policies

You can define leave type accrual policies by employee category for accruing leave types. You can also completely hide accruing leave types from employee categories such as contractors by ensuring no accrual rules are defined for that combination of leave type / category. See page 19 for more information.

> If you do not define accrual policy rules in the Employee Categories page for accruing leave types, employees will not be able to select them when requesting leave.

Using leave sub types

You can enable leave sub types for any leave type. Leave sub types allow you to track additional information about a leave. A common scenario is where an organization provides a "Personal" leave that can be used for illness, family, or emergencies. With leave sub types, you can define a "Personal" leave type and then sub types from which employees must select when entering a leave request.

You can add, edit, and delete leave sub types. You cannot delete a leave sub type that is being used by other records (such as leave requests).

To access leave sub types, click the expand button (+) next to a leave type.

Enabling or disabling leave types

You can enable or disable leave types for each calendar where appropriate. This allows you to define different leave types for different calendars, which are typically associated with different geographic locations.

1. From the **Leave Types** page, click the **By Calendar tab**
2. Select a calendar
3. Check the **Active** box for each leave that is applicable to the selected calendar
4. Check the **Default** box for the leave type that is most frequently used by your employees (such as vacation, for example)
5. Click **Save**

employee categories

About employee categories

Employee categories allow you to organize employees and manage leave policies accordingly.

Once you've defined your categories (examples might be: regular, executive, or contractor) you can then define related accrual policies. Employees will inherit the accrual policies defined for the category to which they are assigned.

Employees can be assigned to different categories over time using effective dates. Categories can be bulk assigned (see below).

Managing employee categories

You can add, edit, and delete categories. You cannot delete a category that is being used by other records (such as employees).

- The **Active** flag determines whether you can select the item in other parts of the application; you can deactivate an item to retire it without deleting it.
- The **Is On Payroll** flag determines whether employees in this category will appear on the payroll processing exports.

Managing accrual policies by category

Click the expand button (+) for a category to see the associated leave type accrual rules. You can add, edit, and delete rules.

- **Leave Type** is the leave type to which the rule applies.
- **Min. Service Years** is the minimum number of service years that must have elapsed since the employee's start date. Enter 0 for rules that take effect as soon as an employee is hired. See page 10 for information on how service years can be calculated.
- **Hours Accrued** is the number of hours that the employee will accrue within a service year. Note that you can use work schedule policies to apply an accrual "rate factor" to adjust the hours accrued according to the proportion of time worked. See page 21 for more information.
- **Can Carry Over** determines if unused time can be carried over from one year to the next.

- **Overdraw Limit** is the maximum number of unaccrued hours that an employee can 'borrow' before warnings are displayed.

Example

You might define the following vacation policy rules for regular employees.

Leave Type	Min. Service Years	Hours Accrued	Can Carry Over	Overdraw Limit
Vacation	0	120	Yes	40
Vacation	4	160	Yes	40

In the example above, regular employees working 40 hours per week will begin accruing 3 weeks of vacation when they are hired and then they will begin accruing 4 weeks of vacation after 4 years of service, or in their 5^{th} year. Warnings will be displayed if an employee attempts to request more than one week of unaccrued time.

The effects of policy changes are immediate and retroactive. If you are changing established policies, you should create new policies and assign employees to the new policies as of a specific date rather than modify the existing policies. This will leave all past data intact.

Bulk assigning employee categories

Policies can be bulk assigned to employees. This can be especially useful when introducing new policies to your organization.

To bulk assign a policy:

1. Click **Bulk Assign** for the policy you wish to assign
2. Select or enter the **Effective** date; this is the date on which the policy will take effect for the selected employees
3. Select the affected employees from the **All employees** list and click **Add**
4. *Bulk changes cannot be undone in bulk. Review your changes before proceeding*.
5. Click **Assign**; the changes will be validated for each employee and any errors must be corrected before any changes will be made.

work schedule policies

About work schedule policies

Work schedule policies define the number and length of days that an employee typically works over a specific period of time, such as five 8-hour days per week. You can also define an accrual "rate factor" to adjust the standard leave hours accrued according to the time worked.

Work schedule policies can be defined to accommodate full-time, part-time, or even flex-time work schedules such as compressed work weeks.

Employees can be assigned to different policies over time using effective dates. Policies can be bulk assigned (see below).

Managing work schedule policies

You can add, edit, and delete policies. You cannot delete a policy that is being used by other records (such as employees).

- The **Active** flag determines whether you can select the item in other parts of the application; you can deactivate an item to retire it without deleting it.
- **Schedule Period** is either 1 week or 2 weeks.
- **Closures Minutes** determines the default length of an office closure. Typically this would be the same as the default day length, but it may be different for certain types of schedules or employees.
- **Rate Factor** is a multiplier between 0.0 and 1.0 used to adjust the standard accrual policy rules for the employee category. For example, if regular full-time employees accrue 120 hours of vacation in a year, a part-time employee working 60% of that time may only accrue 72 hours of vacation. A rate factor of 0.6 would allow you to adjust the default accrual policy rules for such part-time employees accordingly.
- **Default Rule** is the default day rule for the work schedule policy. This is useful if the employee can work multiple day lengths (such as in some in compressed work week schedules). The application will assume this is the default type of day when evaluating related schedules.

Managing day rules by policy

Click the expand button (+) for a policy to see the associated day rules. You can add, edit, and delete day types.

- **Day Count** is the number of days of the specified duration that are usually worked over the **Schedule Period** specified for the policy.
- **Minutes In Day** determines the duration of the days for the rule.

> The effects of policy changes are immediate and retroactive. If you are changing established policies, you should create new policies and assign employees to the new policies as of a specific date rather than modify the existing policies. This will leave all past data intact.

Example 1 – Full time

You might define the following work schedule policy for a typical full-time worker.

Description	Schedule Period	Closure Minutes	Rate Factor	Default Rule
5x8 (40 hours)	1 week	480	1	5 day(s) @ 480

Day Count	Minutes In Day
5	480

In the example above, the employee works a 40 hour work week over 5 days.

Example 2 – Part time

You might define the following work schedule policy for a typical part-time worker.

Description	Schedule Period	Closure Minutes	Rate Factor	Default Rule
3x8 (24 hours)	1 week	480	0.60	3 day(s) @ 480

Day Count	Minutes In Day
3	480

In the example above, the employee works a 24 hour work week over 3 days.

Example 3 – Compressed work week

You might define the following work schedule policy for a flex-time worker.

Description	Schedule Period	Closure Minutes	Rate Factor	Default Rule
CWW 8x9/1x8 (80 hours)	2 weeks	540	1	8 day(s) @ 540

Day Count	Minutes In Day
8	540
1	480

In the example above, the employee works 80 hours over 2 weeks, with eight 9-hour days, one 8-hour day, and one working-day off.

Bulk assigning work schedule policies

Policies can be bulk assigned to employees. This can be especially useful when introducing new policies to your organization.

To bulk assign a policy:

1. Click **Bulk Assign** for the policy you wish to assign
2. Select or enter the **Effective** date; this is the date on which the policy will take effect for the selected employees
3. Select the affected employees from the **All employees** list and click **Add**
4. *Bulk changes cannot be undone in bulk. Review your changes before proceeding*.
5. Click **Assign**; the changes will be validated for each employee and any errors must be corrected before any changes will be made.

telework policies

About telework policies

Telework policies define how many telework days an employee can work over a specific period of time. For example, you may have some employees who can work one day a week from home and some employees who can work two days a week from home.

Employees can be assigned to different policies over time using effective dates. Policies can be bulk assigned (see below).

Managing telework policies

You can add, edit, and delete policies. You cannot delete a policy that is being used by other records (such as employees).

- The **Active** flag determines whether you can select the item in other parts of the application; you can deactivate an item to retire it without deleting it.
- **Schedule Period** is either 1 week or 2 weeks.
- **Max Days** is the maximum number of telework days that can be worked over the specified **Schedule Period**.

The effects of policy changes are immediate and retroactive. If you are changing established policies, you should create new policies and assign employees to the new policies as of a specific date rather than modify the existing policies. This will leave all past data intact.

Bulk assigning telework policies

Policies can be bulk assigned to employees. This can be especially useful when introducing new policies to your organization.

To bulk assign a policy:

1. Click **Bulk Assign** for the policy you wish to assign
2. Select or enter the **Effective** date; this is the date on which the policy will take effect for the selected employees
3. Select the affected employees from the **All employees** list and click **Add**
4. *Bulk changes cannot be undone in bulk. Review your changes before proceeding*.
5. Click **Assign**; the changes will be validated for each employee and any errors must be corrected before any changes will be made.

job titles

About job titles

Job titles can be assigned to employees and displayed in the employee directory.

Managing job titles

You can add, edit and delete job titles. You cannot delete a job title that is being used by other records (such as employees).

- The **Active** flag determines whether you can select the item in other parts of the application; you can deactivate an item to retire it without deleting it

office locations

About office locations

Office locations can be assigned to employees and displayed in the employee directory. This can be useful when you have multiple office spaces, buildings, or branches.

Managing office locations

You can add, edit and delete office locations. You cannot delete an office location that is being used by other records (such as employees).

- The **Active** flag determines whether you can select the item in other parts of the application; you can deactivate an item to retire it without deleting it

employee information

Viewing employee information

You can view a list of all of your organization's employees.

1. On the **Administration** menu, click **Employees**
2. Filter on a column by clicking into the header and typing your criteria, or use the header drop-down if available to select your criteria
3. Sort by a column by clicking its header
4. Click an **employee's number** to see more information about that employee
5. Use the page navigation bar to move between pages of results by clicking the arrows or a specific page number
6. To export your results, select the export format from the **Export format** list and then click **Export**

adding employees

Pre-requisites

Before adding employees, it is recommended that you follow the configuration instructions earlier in this guide to establish settings, options, and policies appropriate for your organization.

> **!** Although some options can be left blank or at "N/A" when adding new employees, there is no default option for Calendars. You must select a calendar for a new employee, so this requires that you define at least one calendar before adding any employees.

Migrating to EmployeeVu

When you migrate existing employee records to EmployeeVu, it is important to understand how the system determines when employees begin accruing time.

The system start date (see page 9), determines the earliest date when employees can begin modifying data and when they start accruing time. If an employee's start date is before the system start date, they will begin accruing time on the system start date.

Use time credits/debits (see pages 35 and 45) to establish initial starting time balances for existing employees.

For example, John Smith started working for your organization on June 15, 2003 and you're planning to begin using EmployeeVu on January 1, 2011. In this scenario:

1. Set the system start date to January 1, 2011 (see page 9)
2. Import or enter John's employee record with a start date of June 15, 2003 (see pages 31 and 43)
3. Import or enter John's outstanding time credits (i.e. vacation) as of January 1, 2011 (see pages 35 and 45)

Employee records, starting time credits, and demographics data can all be imported in bulk. See page 40 for details.

New employee form

The new employee form contains a subset of the employee data fields presented when editing an employee. The most important fields have been condensed into a single form for your convenience.

1. On the **Administration** menu, click **New Employee**
2. Enter an **Employee #**, or use the **Generate** button to generate a unique number
3. Enter the employee's **Last Name**
4. Enter the employee's **First Name**
5. Enter the employee's **Login** information; this is the employee's standard Windows network login identity
    a. Enter the domain name in the first box
    b. Enter the employee's login ID in the second box
    c. You can leave these fields blank if the login ID is not yet known
6. Enter the **Email** address; you can leave this blank if the address is not yet known
7. Select a **User Role** (see details on page 31)
8. If you want to prevent a user from logging in, check **Disable Login**
9. Enter or select the **Company Start** date; service year calculations will be based on this date
10. For fixed term employees, you can enter an **End** date; the employee will automatically become inactive after the **End** date
11. Optionally select a **Department**
12. Select a **Manager**; optional if you change the Approver option below
13. Select an **Approver** option:
    a. **Manager**. Only the person selected as the Manager approves the employee's requests
    b. **Auto-approve**. Requests will be automatically approved
    c. **Other employee**. Select an employee who will approve the employee's requests by default
14. Optionally select or type a **Job Title**
15. Optionally select an **Office Location**
16. Optionally enter a **Desk Location**, **Work Phone**, and **Mobile Phone**
17. Select a **Calendar**
18. Select an employee **Category**
19. Select a Schedule **Policy**
20. Optionally select a **Telework Policy**
21. Click **Save**

basic details

Editing basic details

Basic details include all of the employee's core information, such as their employee number and name.

1. On an employee page, click the **Basic Details** tab
2. Click **Edit**
3. Enter an **Employee #**, or use the **Generate** button to generate a unique number
4. Enter the employee's **Last Name**
5. Enter the employee's **First Name**
6. Enter the employee's **Login** information; this is the employee's standard Windows network login identity
    a. Enter the domain name in the first box
    b. Enter the employee's login ID in the second box
    c. You can leave these fields blank if the login ID is not yet known
7. Enter the **Email** address; you can leave this blank if the address is not yet known
8. Select a **User Role**
9. If you want to prevent a user from logging in, check **Disable Login**
10. Enter or select the **Company Start** date; service year calculations will be based on this date
11. For fixed term employees, you can enter an **End** date; the employee will automatically become inactive after the **End** date
12. Click **Save**

About user roles

There are three assignable user roles.

User	Standard employee permissions; manager permissions are implicit – an employee becomes a manager when at least one other employee reports to them
Dept Admin	Can access and modify all data for their department, as if they were a manager for everyone in their department
HR Admin	Can access and modify data for the entire organization and perform all administrative functions

Calendars

You can assign calendars to employees using an effective date.

1. On an employee page, click the **Basic Details** tab
2. Click **Change calendar**
3. Enter or select an **Effective Date**; this is the date on which the employee will be subject to the new calendar (must be the same as or after the last calendar change)
4. Select a calendar from the **New Calendar** list
5. Click **Save**

You can discard the last calendar change.

1. On an employee page, click the **Basic Details** tab
2. Click **Discard last calendar change**
3. Click **OK** to confirm

Deleting an employee

You can delete employee accounts that have never been used to modify data.

1. On an employee page, click the **Basic Details** tab
2. Click **Delete this employee**
3. Click **OK** to confirm; the deletion will fail if the employee account has been used to modify data

organizational details

Editing organizational details

Organizational details include information about the employee's position as well as optional directory information.

1. On an employee page, click the **Organizational** tab
2. Click **Edit**
3. Optionally select a **Department**
4. Select a **Manager**; optional if you change the Approver option below
5. Select an **Approver** option:
    a. **Manager**. Only the person selected as the Manager approves the employee's requests
    b. **Auto-approve**. Requests will be automatically approved
    c. **Other employee**. Select an employee who will approve the employee's requests by default
6. Optionally select or type a **Job Title**
7. Optionally select an **Office Location**
8. Optionally enter a **Desk Location**, **Work Phone**, and **Mobile Phone**
9. Click **Save**

policies

Editing policies

The employee's category, work schedule, and telework policies govern various aspects of the employee's time accruals and scheduling.

1. On an employee page, click the **Policies** tab
2. Click a specific policy sub-tab to see the employee's current policy data

See the **Organizational Options** section of this guide for more information on each type of policy.

You can assign policies to employees using an effective date.

1. On the policy tab, click **Change [policy name]**
2. Enter or select an **Effective Date**; this is the date on which the employee will be subject to the new policy (must be the same as or after the last policy change)
3. Select a policy from the **New [policy name]** list
4. Click **Save**

You can discard the last policy change.

1. Click **Discard last [policy name] change**
3. Click **OK** to confirm

Bulk assigning policies

Policies can be bulk assigned to employees. This can be especially useful when introducing new policies to your organization.

- To bulk assign employee categories, see page 20.
- To bulk assign work schedule policies, see page 23.
- To bulk assign telework policies, see page 25.

time credits/debits

About time credits/debits

Time credits/debits allow you to manually adjust time balance calculations by adding or subtracting time as of a certain date. This is most commonly needed to set initial time balances when transitioning existing employees to EmployeeVu. However it can be used at any time to manually add or subtract time from balance calculations.

Editing credits/debits

You can add, edit, and delete time credits/debits.

1. On an employee page, click the **Time Credits/Debits** tab
2. Use the Add, Edit, and Delete buttons to perform the correlating action
   - The **Effective** date determines when the addition or subtraction will be incorporated into the time balance calculations; for starting balances, the effective date is usually the same as the System Start Date (see page 9)

demographics

Editing demographic data

Demographic data includes employee address information and emergency contacts.

1. On an employee page, click the **Demographics** tab
2. Click **Edit**
3. Update the **Effective Date** to make the data current and to store the previous information into a historical file, otherwise the current data will be overwritten
4. Click **Save**

employment termination

When employment is terminated

Employees can be deactivated by setting their End date of service. Employee records will remain in the system. However, inactive employee data will be hidden from most default views.

1. On an employee page, click the **Basic Details** tab
2. Click **Edit**
3. Enter an **End** date; the employee will automatically become inactive after the **End** date
4. Click **Save**

Final time balance

To determine the employee's final time balance, such as final vacation balance, refer to the employee's **Year End Balance** in the **Time Balance** panel shown on the employee's **Summary** tab. This value will take into account the employee's **End** date of service.

> Employees may have submitted, unapproved leave requests outstanding. Review and approve such requests to ensure they are factored into final balance calculations.

payroll processing

About payroll processing

Processing allows you to periodically export leave data for data entry into your payroll system. Modifications to processed leave data are restricted, allowing you to establish a baseline for each payroll period against which changes can be tracked.

1. Leave request data (Approved and Cancelled requests) up to the selected payroll date are frozen and marked as **In Processing**
2. Leave request data is exported to a file format of your choice
3. When payroll data entry is complete, leave request data is marked as **Processed**

About processed requests

Requests in the **Processed** state cannot be withdrawn directly by employees. Because they have been processed for payroll purposes, they must be cancelled by the employee's manager or by administrative personnel.

Cancelled requests are included in the next payroll export as a reversal of processed requests. Once they are processed their state becomes **Processed-Cancelled** and they cannot be modified in any way.

Processing leave data

To process leave data:

1. On the **Administration** menu, click **Processing**
2. Select or enter the **Payroll Date**
3. Click **Pre-Process**; a preview of the affected requests will be displayed
4. Select a file format from the **Export format** list
5. Click **Export**
6. After your payroll data entry is complete, click **Process**
7. Click **OK** to confirm

Each payroll export is saved on the **Archives** tab, whether or not you choose to actually export the data to a file.

Processing options

A number of options are available to customize payroll processing exports.

1. On the **Administration** menu, click **Processing**
2. Click **Options**
3. Optionally modify the **Date Format** and click **Save**; or click **Reset** to go back to the default date format
4. You can also modify column visibility, order, and length (only fixed-width text files apply column width settings)
   a. Click **Edit** for a column
   b. Check **Visible** to make a column visible
   c. Enter the **Position**
   d. Enter the **Length**; values will be padded or truncated as is necessary for fixed-width text files
5. Click **Reset** if you want to go back to the default export column settings

importing data

About importing data

The import feature is designed to help your organization get up and running quickly with EmployeeVu by reducing the amount of initial manual data entry required to establish employee accounts.

Using the import feature, you can:

- Add employee records
- Add employee credits/debits
- Add and update employee demographic data

You can import data from Microsoft Excel. The format for each type of import is described below. Templates are also provided for your convenience.

> Although you can undo some import operations, **it is recommended that you back up your database before beginning import operations.** The EmployeeVu Configuration Manager can be used to easily perform a backup on demand.
>
> See the EmployeeVu Installation Guide for more information about backup.

About the import process

Once your data is ready, all import operations follow the same basic steps.

1. Select the type of import
2. Upload the data file
3. Preview the results
4. Save the results

Detailed instructions for each type of import can be found on the following pages.

Import templates

The following pages define acceptable data file contents, but the import page provides downloadable templates in Microsoft Excel format that you can use to import data. These simple templates include all of the required columns for each type of import. You can copy/paste data into these templates while preparing your data for upload, or you can simply imitate the column structure in your own workbooks.

Importing dates

Note that when importing date columns, the import feature will attempt to parse dates according to the EmployeeVu **Locale** setting described on page 10. This setting uses your server's defined regional settings to determine the expected format for locale dates.

Importing data

See the sections below for information about preparing your data for import. Once your data file is prepared, follow these steps:

1. **Backup** your database (see the Installation Guide for details)
2. On the import page, select the **import type**
3. Click **Browse** and select the file to be imported
4. Click **Upload**; any validation errors will be reported in the **Result** box
5. Once all records pass validation, a preview of the detected data will be displayed
6. Click **Save** to commit the changes to the database

Using raw import mode

By default, EmployeeVu uses your server data drivers to import Excel data files. If you have technical difficulties importing Excel files, you can use the raw import mode instead of uploading files. In this mode, you copy/paste data from Excel to EmployeeVu.

1. **Backup** your database (see the Installation Guide for details)
2. On the import page, select the **import type**
3. Click **Switch to raw mode**
4. Using Excel, open your data file and select the appropriate worksheet
5. Press **Ctrl-A** to select all rows and columns
6. Press **Ctrl-C** to copy all data to the Clipboard
7. In the EmployeeVu import page, click into the large text field displayed under **Import file** and press **Ctrl-V** to paste the data; the data may appear to be formatted incorrectly for large tables – this is normal
8. Click **Upload**; any validation errors will be reported in the **Result** box
9. Once all records pass validation, a preview of the detected data will be displayed
10. Click **Save** to commit the changes to the database

Migrating to EmployeeVu

See page 29 for important information about migrating existing employee records to EmployeeVu.

Undoing imports

After importing new employee records or time credits/debits, you can undo the import, which deletes the imported records. This may be necessary if incorrect data is imported.

1. On the import page, click **Click here to Undo a previous import of employees or time credits/debits**
2. In the import log, click **Undo Import** for the operation you would like to reverse
3. Click **OK** to confirm; note that if an imported employee account has been used to modify data, it cannot be deleted

About employee data

New employee records can be imported. You cannot update existing employee records using the import feature. You can import as many employees as is allowed by your software license.

Employee data definitions

All of the following columns must be included in the import file. The **Type** column indicates the expected type of content. The column does **not** need to be specially formatted in Microsoft Excel as the indicated column type.

Column Name	Type	Description
EmployeeNumber	Alphanumeric	The employee's unique identification number
LastName	Alphanumeric	Last name, up to 50 characters
FirstName	Alphanumeric	First name, up to 50 characters
Domain	Alphanumeric	The domain portion of the employee's Windows network login ID; for example, if their full login ID is "Company\JSmith" then "Company" should entered into this column
Login	Alphanumeric	The login name portion of the employee's Windows network login ID; for example, if their full login ID is "Company\JSmith" then "JSmith" should entered into this column
Email	Email address	The employee's email address
ServiceStart	Date	Start date of employment; date format must match EmployeeVu Locale setting
ServiceEnd	Date	End date of employment, if applicable; can be left blank; date format must match EmployeeVu Locale setting
Department	Alphanumeric	Must match a department name defined in your system options; can be left blank
Manager	Alphanumeric	Full name* of the employee's manager; can be left blank**
Approver	Alphanumeric	Full name* of the employee's approver; can be left blank**
JobTitle	Alphanumeric	Up to 50 characters; can be left blank
Calendar	Alphanumeric	Must match a calendar name defined in your system options
Category	Alphanumeric	Must match an employee category name defined in your system options

Schedule	Alphanumeric	Must match a schedule policy name defined in your system options
Telework	Alphanumeric	Must match a telework policy name defined in your system options; can be left blank
OfficeLocation	Alphanumeric	Must match an office location defined in your system options; can be left blank
WorkPhone	Alphanumeric	Up to 50 characters; can be left blank
MobilePhone	Alphanumeric	Up to 50 characters; can be left blank
DeskLocation	Alphanumeric	Up to 50 characters; can be left blank

* The Manager's and Approver's full name is expected to be in the format specified for names in your General Settings described on page 10.

** Managers are approvers by default. If both Manager and Approver are supplied, then approvals will route to the Approver. If both Manager and Approver are left blank, then the employee will be set to auto-approve.

About manager validation

Manager relationships cannot be fully validated until after all employee records are imported. If any manager relationship fails validation, the affected employee will be set to auto-approve and their manager will be left unassigned. The import will succeed and the validation errors will be reported.

The following manager validation checks are performed after the import succeeds:

- **Circular reporting**. Employee A cannot report to employee B if employee B already reports to employee A indirectly.
  For example:
  - Jane Smith
    - John Brown
      - Suzy Williams

  In the scenario above, Jane cannot be made to report to Suzy, because Suzy already reports to Jane indirectly.

- **Management level limit**. EmployeeVu supports a maximum depth of 16 levels of management.

About time credits/debits

Employee time credits/debits are used to add or subtract time as of a specific date. Typically they are used when moving existing employee records to EmployeeVu in order to establish starting time balances.

Time credit/debits can be imported after you have imported core employee data. Importing time credits/debits will add new records to the database.

Time credits/debits data definitions

Imported time credits/debits will be associated with employees via the employee number column. All of the following columns must be included in the import file. The **Type** column indicates the expected type of content. The column does **not** need to be specially formatted in Microsoft Excel as the indicated column type.

Column Name	Type	Description
EmployeeNumber	Alphanumeric	Must match an existing employee number
Effective	Date	Date on which the balance should be added or subtracted; date format must match EmployeeVu Locale settings; see additional notes below*
LeaveType	Alphanumeric	Must match a leave type name defined in your system options
Minutes	Integer	Can be negative; the number of minutes to be added or subtracted as of the effective date for the specified leave type.

* The effective date must be on a date that is active for the employee. For example, it must be on or after the employee's start date and on or after the system start date, whichever is later. The employee must also be assigned to a calendar that has been published for this date.

About demographic data

Employee demographic data can be imported after you have imported core employee data. Importing demographic data will update the current demographic records.

Demographic data definitions

Imported demographic data will be associated with employees via the employee number column. You may include some or all columns in the import file. The **Type** column indicates the expected type of content. The column does **not** need to be specially formatted in Microsoft Excel as the indicated column type.

Column Name	Type	Description
EmployeeNumber	Alphanumeric	Must match an existing employee number
HomePhone	Alphanumeric	Home phone number
MobilePhone	Alphanumeric	Mobile phone number
HomeEmail	Alphanumeric	Home email address
PhysicalStreet	Alphanumeric	Physical street address
PhysicalCity	Alphanumeric	Physical city
PhysicalState	Alphanumeric	Physical state / province
PhysicalCountry	Alphanumeric	Physical country
PhysicalZip	Alphanumeric	Physical zip / postal code
MailingIsSame	Boolean	True or false; indicates if the mailing address is the same as the physical address
MailingStreet	Alphanumeric	Mailing street address
MailingCity	Alphanumeric	Mailing city
MailingState	Alphanumeric	Mailing state / province
MailingCountry	Alphanumeric	Mailing country
MailingZip	Alphanumeric	Mailing zip / postal code
EmergencyName	Alphanumeric	Emergency contact name
EmergencyRelationship	Alphanumeric	Emergency contact relationship
EmergencyMobilePhone	Alphanumeric	Emergency contact mobile phone
EmergencyWorkPhone	Alphanumeric	Emergency contact work phone number
EmergencyHomePhone	Alphanumeric	Emergency contact home phone number

reporting/exporting

About reporting

Basic reporting and exporting features are integrated throughout the application, including real-time interactive filtering and sorting of many types of data as well as exports to common file formats.

Standalone administrative reports and exports are accessible on the **Reports** submenu of the **Administration** menu.

Leave Time

The Leave Time report uses a pivot table interface to support analysis of leave time. It supports interactive layouts, filtering, sorting, and basic charting.

You can save your report customizations as a named report that you can easily pull up at a later time. The pivot table content and chart can also be exported.

To customize the report:

1. Drag and drop fields into the row or column areas, depending on whether you'd like them displayed as rows or columns
2. Drag and drop data fields, such as Hours and/or Days, into the data field area
3. Filter a field by clicking the dropdown arrow next to the field name and select the value(s) you'd like to filter
4. Sort on a field by clicking the field name
5. You can define complex filters by clicking **Show prefilter** and specifying your criteria
6. Click **Show chart** to see the chart; you must click **Refresh chart** to update the chart if you make changes to the pivot table

To save your current report view:

1. Click **Save As**
2. Enter a **Report Name**
3. Click **Save**

To view a saved report:

1. Select the report from the **Custom report** dropdown list

Employee Anniversaries

The anniversary report lets you see which employees have their employment anniversaries in a given month of the year and how many years of service they have completed. They must have started employment prior to the current year.

Demographics Export

The Demographics Export can be used to export all current employee demographic data.

Time Balance Export

The Time Balance Export can be used to export all employee time balances. It also includes additional employee fields that are not displayed in the time balance tables within EmployeeVu, such as employee department, category, manager and calendar.

In addition, this export allows you to specify an **As Of** date parameter which determines the date for which the **Available** column applies. You can use this feature to see what the time balance information looked like on a past date or will look like on a future date based on the data that is currently available.

licensing

About licensing

EmployeeVu licensing is managed via a license file. A license file is a small, encrypted file that is given to you when you purchase the software.

- The license authorizes your organization to manage a certain number of active employee records
- The license allows you to install new software updates for a predetermined amount of time

The system will prevent you from adding new employee records once you've reached the license limit. Warnings will also appear when you near the limit.

Uploading a license file

You can upload a new license file when you first install EmployeeVu or at any time thereafter.

1. From the **Licensing** page, click **Browse…**
2. Navigate to the license file and select it, then click **Open**
3. Click **Upload**

The license will be validated and saved. Licensing changes take effect immediately.

application state

About the application state

The application state allows you to control the overall availability of the system. Three states are supported.

1. **Online**. This is the normal operating state.
2. **Going Offline**. This state can be used to warn users of impending maintenance.
3. **Offline**. Non-administrative users are locked out.

You would typically bring the system offline when upgrading the application, performing server maintenance, and so forth.

Warn users

When the system is Online, you can warn users about impending maintenance.

1. From the **Application State** page, click **Warn Users...**
2. Optionally update the **Message**; this will be displayed in a banner at the top of the application screen
3. Click **Save**; changes take effect immediately
4. If needed, click **Edit Message** to update the message without changing the state

Go offline

When the system is Online or Going Offline, you can take it offline.

1. From the **Application State** page, click **Go Offline...**
2. Optionally update the **Message**; this will be displayed to end users who attempt to access the system
3. Click **Save**; changes take effect immediately
4. If needed, click **Edit Message** to update the message without changing the state

Go online

When the system is Offline or Going Online, you can take it back online.

- From the **Application State** page, click **Go Online**

event log

About the event log

The EmployeeVu event log is an internal log of important application events. It tracks major system events and any errors that may occur.

There is a rolling limit to the number of errors that will be stored.

Clearing the event log

You can clear the event log at any time.

1. From the **Event Log** page, click **Clear All Events**
2. Click **OK** to confirm

Viewing event details

You can view event details, such as technical error logs.

- From the **Event Log** page, click the **Detail** link for the event you want to view

Unexpected errors will also be logged to the Windows application event log. Please refer to your operating system documentation for additional information about the application event log.

alert log

about the alert log

The alert log tracks all email alerts that have been sent or that are waiting to be sent. EmployeeVu web pages queue email alerts and then they are sent asynchronously by a process which manages throttling, retries, and other aspects of sending alerts. You can use the alert log to confirm if emails were sent, if they were sent correctly, or if there are problems.

There is a rolling limit to the number of alerts that will be stored.

Temporarily disabling alerts

You can temporarily disable alerts from being sent to your SMTP server. Alerts will still be queued by the application if they are otherwise enabled.

1. From the **Alert Log** page, click **Stop Sending Alerts**
2. Click **OK** to confirm
3. Click **Start Sending Alerts** to re-enable alerts

Clearing the alert log

You can clear sent alerts at any time.

1. From the **Alert Log** page, click **Clear All Sent Alerts**
2. Click **OK** to confirm

Viewing alert details

- From the **Alert Log** page, click the **View Alert** link for the alert you want to view

Deleting specific alerts

You can delete specific alerts from the log, such as alerts that cannot be sent correctly for technical reasons.

- From the **Alert Log** page, click the **Delete** link for the alert you want to delete

user activity

Viewing user activity

You can view current and recent user activity within the EmployeeVu application.

- From the **User Activity** page, click **Range** to select a specific timeframe

You will see one row per employee. The system shows the last page accessed for each employee.

SUPPORT

getting help

Additional support and assistance

The EmployeeVu web site is your number one resource when you have questions or problems

- Find additional information and news
- Get the latest software updates and documentation
- Submit requests for assistance using online forms or email

http://www.employeevu.com