EmployeeVu User Guide

Version 2012

http://www.employeevu.com

contents

INTRODUCTION

overview

About this guide

This guide is designed for employees and managers to help you discover and perform common activities within EmployeeVu. Administrative personnel should refer to the Administrator Guide for information about system configuration.

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

general navigation

This section contains general information that is applicable throughout the application.

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.

Main menu

The application menu is your main method of navigating to different areas of the application. The available options will vary depending on your role.

Navigating the calendars

You can change the month being viewed in most of the application calendars.

- Click one of the single arrows to change to the previous or next month
- Click one of the double arrows to change to the previous or next year
- Click the month name to pick a specific month from the popup, then click **OK**

About scope lists

You will find **Scope** lists throughout the EmployeeVu interface. These lists allow you to filter which employees you will see in a list, table, or calendar. The available options will vary depending on the context and your role.

You can also define custom employee groups that will appear as options within these lists. More information about employee groups can be found on page 17.

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.

your home page

The employee home page

The default start page is your home page. From this page you can see your information at a glance and you can initiate many common activities.

- The **My Information** panel summarizes your basic information
- Important alerts, if any, will be displayed on the top-right
- The main calendar allows you to view your schedule, to request leave, and to manage away-on-business dates
- The **My Time Balance** panel shows your current time accruals and your actual/planned leave information; only approved leave requests affect balances

About alerts

A number of alerts may be displayed on the home page, and you can click an alert link to visit the appropriate page to perform an applicable action.

Alerts are usually shown when a workflow is waiting for you to perform some action, such as when there are leave requests waiting for your approval.

When you're away on business

You can use your home page calendar to indicate that you're going to be out of the office on business.

1. From your home page, click the **Edit Away Dates** tab of the calendar
2. Click a day to toggle your status for the day (changes are saved immediately)

Time balance

Your personal time balance table will appear on the home page. For more information about the table, see page 7.

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time balance

About the time balance table

Throughout EmployeeVu you will see time balance tables to inform you of time taken, planned, and remaining for various leave types.

Time is displayed in days by default. For employees with a flexible work schedule with days of varying lengths, this is an approximation based on the length of the default day type for the assigned work schedule policy. To display time in hours, click **Show time in hours instead of days** at the bottom of the table.

Time balance column definitions

Column	Description
Carry Over	For accruing leave types that can be carried over, this is the amount of unused time available from the previous service year. Depending on your system's settings, service years begin on January 1 or on the employee's employment anniversary.
Annual Accrual	The amount of time normally accrued in a full year for the leave type. An employee may accrue less than this amount if they take unpaid leave. In addition, time can be debited or credited as determined by your organization.
Taken	The amount of approved time that has been requested between the start of the service year and today (or the date for which the table applies).
Available	The amount of time available to be requested as of today (or the date for which the table applies). When submitting a leave request, this is the amount available as of the request start date.
Future Leave	The amount of approved time that has been requested between today (or the date for which the table applies) and the end of the service year. Depending on your system's settings, service years end on December 31 or on the day before the employee's employment anniversary.
Year End Balance	The amount of approved time that is projected to be available at the end of the service year. Depending on your system's settings, service years end on December 31 or on the day before the employee's employment anniversary.

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new leave requests

Entering new leave requests

There are three ways of initiating a new leave request.

- Using your home page calendar
    1. From your home page, click the **Request Leave** link for the first date of your leave
    2. Follow the steps on the next page to fill in the form
- Using the application menu
    1. Click the **Employee Data** menu and then click **New Leave Request**
    2. Follow the steps on the next page to fill in the form
- Using the team calendar
    1. Click the **Employee Data** menu, then click **My Employees -> Calendar**
    2. Click the cell for a given employee and date
    3. Follow the steps on the next page to fill in the form

You can enter a leave request for yourself or on behalf of someone who reports to you. For example, managers can enter a leave request for an employee who is ill.

leave request form

Entering a leave request

Once you've opened a new leave request form:

1. If you're entering the request for someone else, pick their name from the **Employee** list (use the **Scope** list to change who is shown in the list)
2. Enter or select the **Start Date**
   a. If you want to specify less than a full day for the start date, enter or select the number of hours in the **Hours on start** field
3. If the end date is different than the start date, enter or select the **End Date**
   a. If you want to specify less than a full day for the end date, enter or select the number of hours in the **Hours on end** field
4. Select the **Leave Type**
5. Optionally enter **Notes**
6. Click **Save & Review**; the request will now be in the **In Draft** state

Leave request rules

Leave requests are automatically validated against a number of rules.

- The start date must be before or the same as the end date
- The start and end dates cannot be non-working days
- The request dates cannot include the dates of another request, but start and end dates may overlap (for example, half days of two different requests may fall on the same day)
- The request dates cannot span dates where the employee is inactive or where there is no published calendar selected for the employee
- Unpaid time can be requested in whole days only
- Hours on the start and end dates must be greater than 0 and less than or the same as the remaining working time on that date

leave request workflow

About the workflow

Leave requests are managed in a structured workflow.

1. Employee drafts a request
2. Employee submits the request for approval
3. Manager approves or rejects the request
4. Administrative personnel process the approved request, usually for payroll purposes

Submitting a leave request

Once you've saved a leave request:

1. Click **Submit**
2. If you don't want the leave request to be visible in the public Out-of-Office calendar, uncheck the **Visibility** checkbox
3. Click **Submit** to confirm

> Your manager can always see your leave requests.
>
> The public Out-of-Office calendar only shows that you're away. It does not reveal the leave type or notes.

Editing a leave request

You can edit leave requests that are in the **In Draft** state.

1. On the leave request page, click **Edit**
2. Make your changes (the employee name cannot be changed)
3. Click **Save & Review**

Deleting a leave request

You can delete leave requests that are in the **In Draft** state.

1. On the leave request page, click **Delete**
2. Click **OK** to confirm

Withdrawing a leave request

You must withdraw a submitted leave request before you can edit or delete it. You can withdraw a leave request until it is processed by your administrator.

- On the leave request page, click **Withdraw**

Cancelling a leave request

You cannot withdraw a leave request once it has been processed for administrative purposes. However, your manager can cancel the processed leave request.

Contact your manager to request a cancellation. Your manager will have a **Cancel Request** action available for requests in the **Processed** state.

Viewing leave requests

Leave requests can be accessed in a couple of ways.

- By clicking a day of a leave request in your home page calendar
- By using the leave request list
    1. On **the Employee Data** menu, click **All Leave Requests**
    2. To change who you see, select an option from the **Scope** list
    3. 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
    4. Sort by a column by clicking its header
    5. Use the page navigation bar to move between pages of results by clicking the arrows or a specific page number
    6. Click the **Details…** link for a leave request to view it

work schedules

Managing your work schedule

You can define your planned work schedule, including working days, flex schedules, and telework schedules. You can draft changes to your schedule and then submit the changes for approval by your manager.

The options available to you for scheduling depend on the policies you've been assigned by your administrators.

Editing your work schedule

To edit your work schedule:

1. On the **Employee Data** menu, click **My Work Schedule**
2. Under **Available Actions**, click **Edit schedule**
3. Click **OK** to confirm
4. Click the **Working Time** or **Telework** tab
5. Click a day to toggle its status; note that there may be multiple options for a day and different options may be available for each day depending on the type of day and the policies in effect on that day
6. When you're ready, under **Available Actions**, click **Review & submit schedule changes for approval** (the schedule will be validated)
7. The following page will display a list of all changes made and all potential issues that were found during validation
8. Click **Submit**

> You cannot create or edit leave requests while your work schedule is not in the **Approved** state.

Copy and repeat your schedule

You can copy a portion of your schedule and repeat it indefinitely. For example, you can copy a 2 week portion of your schedule and repeat the schedule pattern over a 12 month period.

To copy and repeat your schedule:

1. While editing your schedule, click **Copy and repeat schedule**
2. Under **Copy From**:
    a. Enter or select a **Start** date
    b. Enter or select an **End** date; the Start/End dates represent the date range that will be copied
3. Under **Copy To**:
    a. Enter or select a **Start** date
    b. Enter or select an **End** date; the schedule selected in **Copy From** will be repeated as many times as is possible up to the End date (the copied schedule will be truncated if necessary)
4. Click **Confirm**
5. Click **OK** to confirm

> Copying a schedule does **not** automatically compensate for office closures, holidays, or vacation conflicts. You should inspect the results of the copy operation.
>
> You will also be alerted to potential conflicts when you attempt to submit your schedule for approval.

Clear a portion of your schedule

You can clear a specific portion of your schedule.

1. While editing your schedule, click **Clear portion of schedule**
2. Enter or select a **Start** date
3. Enter or select an **End** date
4. Click **Confirm**
5. Click **OK** to confirm

Undoing drafted schedule changes

1. On the your work schedule page, under **Available Actions**, click **Undo drafted schedule changes**
2. Click **OK** to confirm; your schedule will be reverted to its last approved state

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employee demographics

Employee demographics

You can view and edit your own demographic information. Typically this information is used by administrative personnel for official communications, payroll, and so forth. Your administrators may have chosen to disable this feature.

1. On the **Employee Data** menu, click **My Demographics**
2. Click **Edit** to modify your data
3. Update the **Effective Date** to make your data current and to store your previous information into a historical file, otherwise your current data will be overwritten
4. Click **Save**

Your demographic information can only be accessed by you and your organization's administrative personnel.

company data

Out of office calendar

You can use the public Out of Office calendar to find out who is on leave or away on business. You can also use it to see employee work schedules, such as part-time schedules, flex schedules and telework schedules.

1. On the **Company** menu, click **Out of Office Calendar**
2. See page 5 for basic calendar navigation instructions
3. To change who you see, select an option from the **Scope** list
4. To search for a specific employee, click into the **Employee** column header box and type a name or partial name
5. Hover the mouse over a day to see any additional information
6. Use the page navigation bar to move between pages of results by clicking the arrows or a specific page number

> Only approved leave requests and schedules will be displayed in the Out of office calendar.
>
> Note that employees can also choose not to display individual leave requests on the Out of Office calendar.

Office closures

Office closures are highlighted in many calendars throughout EmployeeVu. You can also browse the list of office closures.

1. On the **Company** menu, click **Office Closures**. By default you will see the office closures for your own calendar and the current year
2. Optionally select specific options from the **Calendar** list and **Year** list

employee directory

Using the employee directory

You can use the employee directory to find common information about employees in your organization. The information displayed in the directory is selected by your administrators, or they may have chosen to disable this feature.

1. On the **Company** menu, click **Employee Directory**
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. Use the page navigation bar to move between pages of results by clicking the arrows or a specific page number
5. To export your results, select the export format from the **Export format** list and then click **Export**

employee groups

Employee groups

You can define and name custom groups of employees and then use these groups in many of the employee scope lists used throughout the application. For example, groups can be used to quickly view the Out of Office calendar for a specific set of individuals.

1. On the **Employee Data** menu, click **Employee Groups**
2. To add a new group
    a. Click **Add**
    b. Enter a description
    c. Click **Save**
    d. Click **Edit Members** for the group you just created
    e. Select employees from the **Employees** list and then click **Add**
    f. Click **Save**
3. To modify a group
    a. Click **Edit Members** next to the group name
    b. To add, select employees from the **Employees** list and then click **Add**
    c. To remove, select employees from the **Group Members** list and then click **Remove**
    d. Click **Save**
4. To rename a group
    a. Click **Rename** next to the group name
    b. Enter a description
    c. Click **Save**
5. To delete a group
    a. Click **Delete** next to the group name
    b. Click **OK** to confirm

Your groups will now appear as options within the employee scope lists where supported. Note that in some views you may not have permissions to see information for the employees you've selected.

management overview

About management features

On a day-to-day basis, managers will typically use EmployeeVu to review and approve employee leave requests and work schedule changes. However, a number of features are available to monitor attendance and accruals.

There are two main ways of analyzing employee data.

1. **Individually**. An employee's most important information can be viewed on a single page.
2. **Side-by-side**. You can view certain types of data for multiple employees side-by-side.
    a. Team calendar (leaves, work schedules, and so forth)
    b. Employee list (basic information like names, policies, and so forth)
    c. Time balance (illness time, vacation time accrued or taken, and so forth)

See the following pages for step-by-step instructions.

managing leave requests

Approving or rejecting a leave request

You can approve or reject submitted leave requests.

1. On the **Employee Data** menu, click **Requests Waiting for Approval**
2. Click the **Details…** link for a leave request to view it
3. Click **Approve** or **Reject**
4. Optionally enter a comment
5. Click **Approve** or **Reject** to confirm

Cancelling a leave request

You can cancel a processed leave request.

1. On the leave request page, click **Cancel Request**
2. Click **OK** to confirm

Undoing a cancellation

Requests in the **Cancelled** state can be returned to the **Processed** state. Requests in the **Processed-Cancelled** state cannot be modified.

1. On the leave request page, click **Undo Cancel**
2. Click **OK** to confirm

managing work schedules

Approving work schedules

To approve a submitted work schedule:

1. On the **Employee Data** menu, click **My Employees** -> **Employee List**
2. Optionally filter the **Schedule State** by **Submitted**
3. Click any of the links in the **Schedule**, **Telework**, or **Schedule State** columns to access the employee's work schedule page
4. Under **Available Actions**, click **Review & approve submitted schedule changes**
5. Review the changes and click **Approve** to confirm

team calendar

Your team calendar

You can use your team calendar to view the schedule for yourself and everyone who reports to you. The team calendar will show all leave requests except those in the **In Draft** state. This allows you to view submitted requests alongside approved requests.

1. On the **Employee Data** menu, expand **My Employees**, then click **Team Calendar**
2. See page 5 for basic calendar navigation instructions
3. To change who you see, select an option from the **Scope** list
4. To search for a specific employee, click into the **Employee** column header box and type your criteria
5. Hover the mouse over a day to see any additional information
6. Click a day to view an existing leave request or to create a new one for that day
7. Click an employee's name to see more information about that employee
8. Use the page navigation bar to move between pages of results by clicking the arrows or a specific page number

employee information

Viewing employee information

You can view a list of employees who report to you. Note that your administrators can choose which fields are displayed.

1. On the **Employee Data** menu, expand **My Employees**, then click **Employee List**
2. To change who you see, select an option from the **Scope** list
3. 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
4. Sort by a column by clicking its header
5. Click an **employee's number** to see more information about that employee
6. Use the page navigation bar to move between pages of results by clicking the arrows or a specific page number
7. To export your results, select the export format from the **Export format** list and then click **Export**

time balances

Viewing time balances

You can view a table of employee time balances for all employees who report to you.

1. On the **Employee Data** menu, expand **My Employees**, then click **Time Balance**
2. To change who you see, select an option from the **Scope** list and optionally select a specific employee from the **Employee** list
3. Filter by leave type by selecting an option from the **Leave Type** list
4. To export your results, select the export format from the **Export format** list and then click **Export**

Note that time balances are calculated dynamically in real-time and they can be performance intensive when viewing a large number of employees. Filter by employee or leave type for a faster response time.

approval delegation

Delegating approvals

As a manager or approver, you can delegate management and approval for your employees to another person while you're away. Optionally, you can specify a specific time range during which the delegation is in effect.

To enable delegation:

1. On the **Employee Data** menu, click **User Preferences**
2. Check **Enabled**
3. Optionally specify **Delegation Start** and **Delegation End** dates; if dates are specified then delegation will be in effect during the given date range only
4. Select an employee from the **Delegate To** list
5. Click **Save**

If you delegate to an employee who reports to you, that employee will be able to approve requests for their peers but will not be able to approve their own requests.