Leave & Expense Management User Guide

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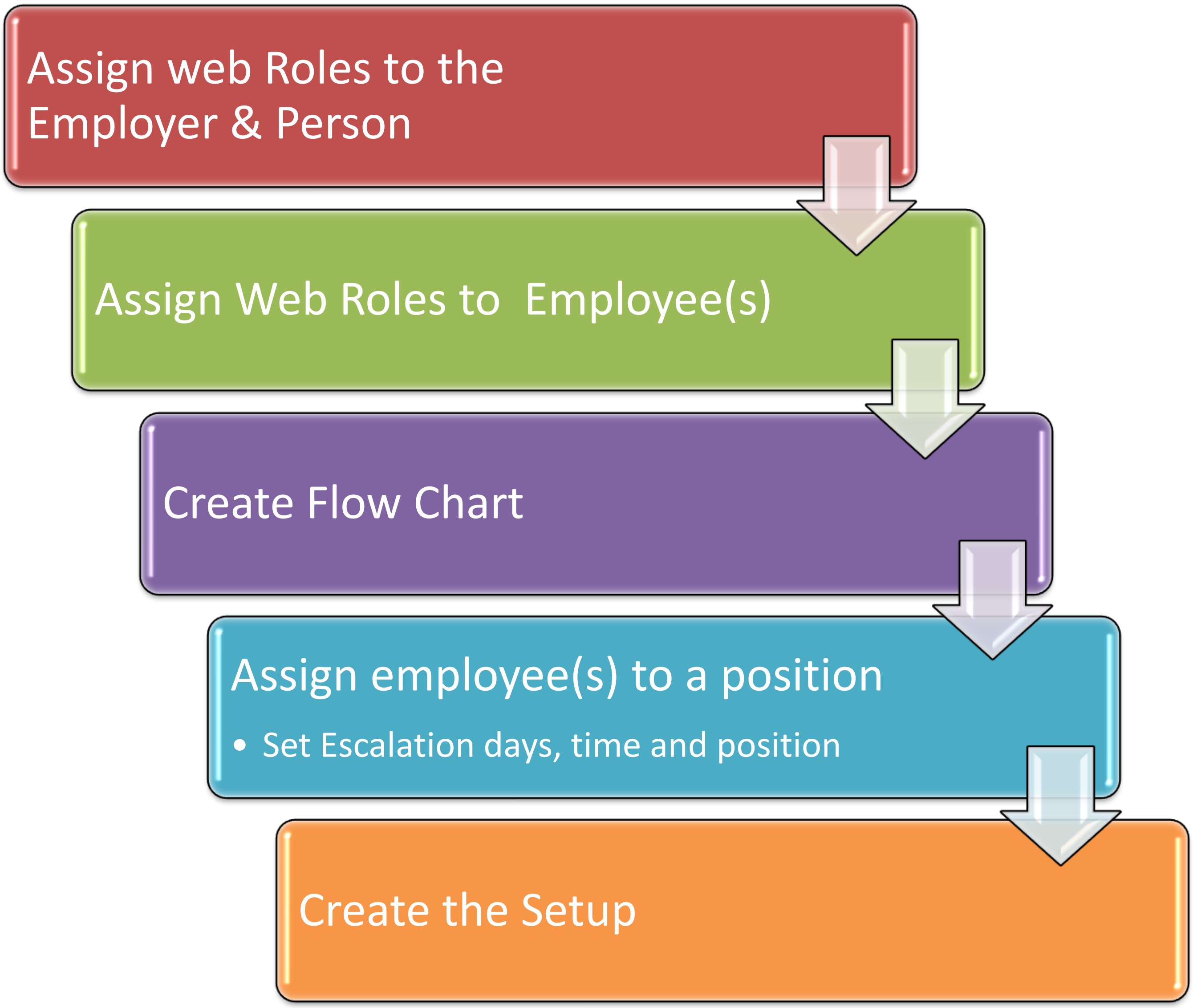
Contents

Purpose:

The purposes of this guide to provide step-by-step instruction for successfully establish leave management for an employer.

Steps to establish Leave & Expense Management

The main steps to establishing Leave & Expense Management is outlined below:



LEAVE & EXPENSE MANAGEMENT GUIDE

Web Roles

A web role defines the type of access an individual can have to the application. For example, if an employee is only to have access to apply for leave, then he/she would be set up as a “User”. In contrast, a manager approving leave would be an “Approver,” where as the overall manager of the leave functionality would be an “Administrator”. There are no limitations to the number of “Users”, “Approvers” or “Administrators”. However it is good practice for there to be a single Administrator with a possible backup “Administrator”.

The table below summarises the functions available for each level of access.

STEP 1: Assign applicable web roles to the Employer

Assigning the web roles will create the additional tabs within the Employer account required for leave management.

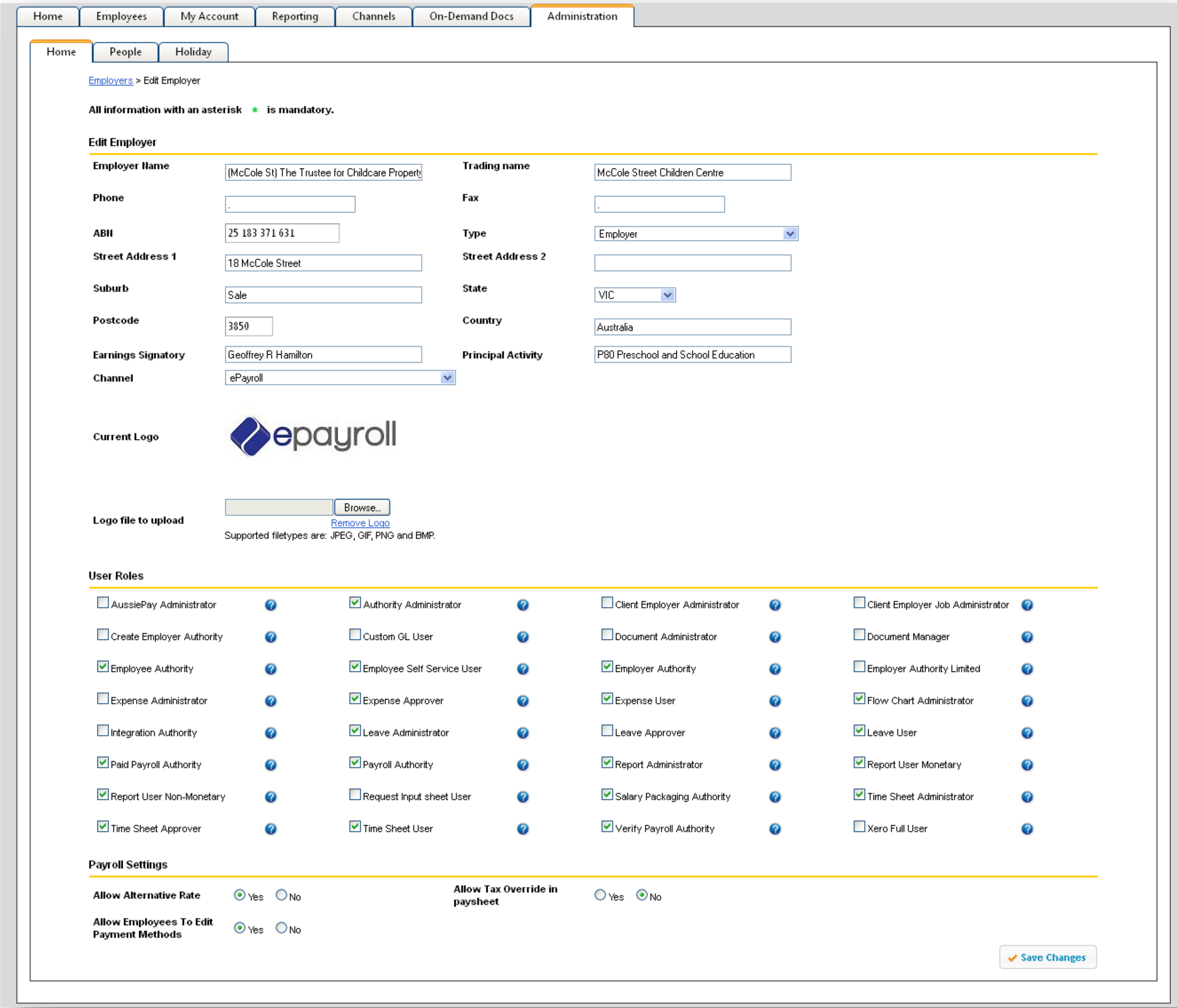
***** This will be performed by your dedicated payroll consultant or ePayroll Support Team *****

To assign the web roles to the employer go to:

Administration>Home>…client name…>Edit>Employer>Leave …web roles…>Save Changes

For Leave access, Expense access, Timesheet access & Flow Chart access*			
	User	Approver	Administrator
Apply for	✓		
Apply on Behalf of		✓	✓
Approve		✓	
Setup			* ✓
Redirect			✓

Select the appropriate web roles and Save Changes.



STEP 2: Assign Web roles to Authorities

Once the web roles have been assigned to the employer, they need to be assigned to the appropriate 'Person'.

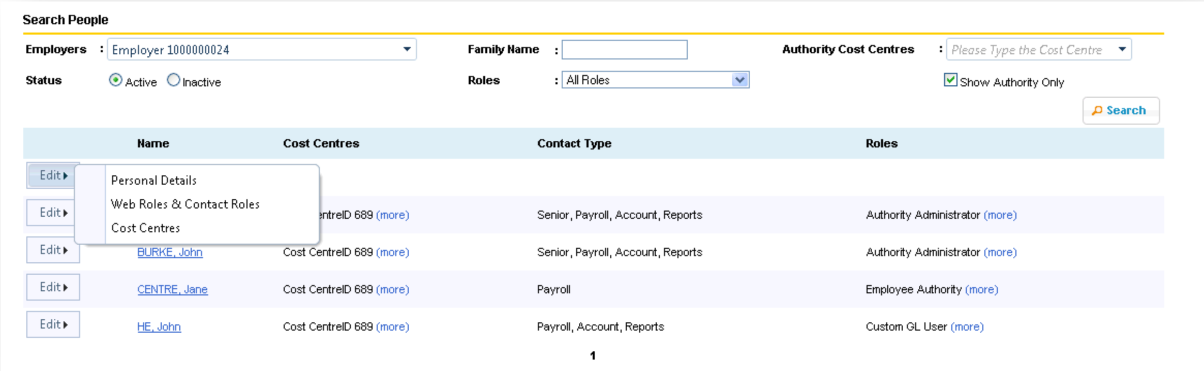
A person is someone who has been given approval by the employer to use the account.

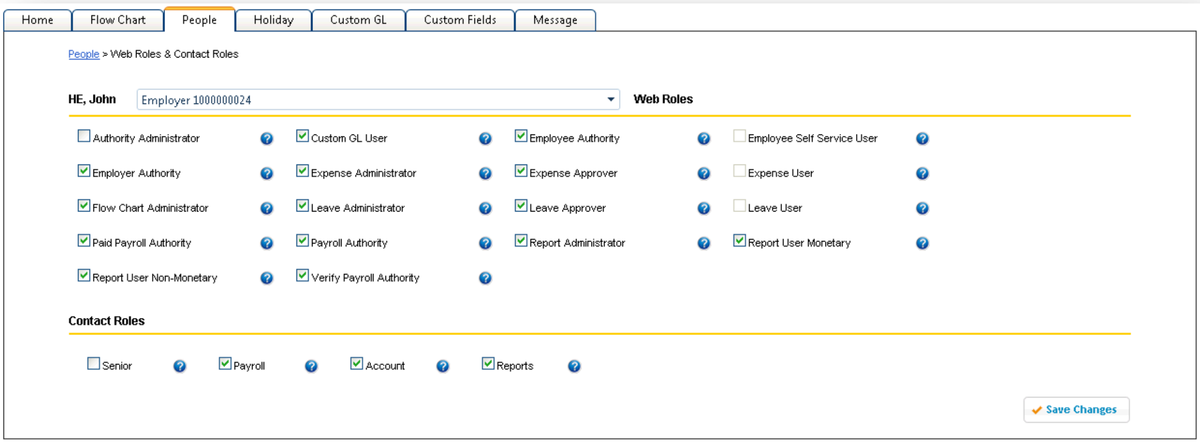
The following table defines in detail the level of access for each web role:

Web Role	Level of Access
Employee Self Service User	✓ view their own payslip ✓ view their own accruals ✓ edit their own personal details ✓ edit their own bank account details *(optional)*
Leave User	✓ apply for leave online ✓ apply for leave on behalf of employees reporting their position ✓ edit leave requests for employees reporting to their position ✓ process leave requests for employees reporting to their position
Leave Approver	✓ apply for leave on behalf of employees reporting their position ✓ approve for leave for employees reporting their position
Leave Administrator	✓ setup and edit Leave Policies ✓ setup and edit positions and reporting structure ✓ redirect leave requests ✓ apply for leave on behalf of any employee
Expense User	✓ apply for expenses online. ✓ apply for expenses on behalf of employees reporting their position ✓ edit expense requests for employees reporting to their position ✓ process expense requests for employees reporting to their position
Expense Approver	✓ apply for expense on behalf of employees reporting their position ✓ approve expenses for employees reporting their position
Expense Administrator	✓ setup and edit Expense Policies ✓ setup and edit positions and reporting structure ✓ redirect expense requests
Flow Chart Administrator	✓ setup and edit multiple flow charts
Timesheet User	✓ can complete their own timesheet ✓ can view their assigned policy details
Timesheet Approver	✓ can complete their own timesheet ✓ can view and edit timesheets for all employees reporting to their position ✓ can assign timesheet policies to all employees reporting to their position
Timesheet Administrator	✓ can complete their own timesheet ✓ can view and edit timesheets for all employees ✓ can create and edit timesheet policies ✓ can assign timesheet policies to all employees ✓ setup and edit positions and reporting structure

To assign the web roles to the Person, go to:

Administration>People>…client name…>Edit Web roles & Contact Roles>Leave Approver and/or Leave Administrator



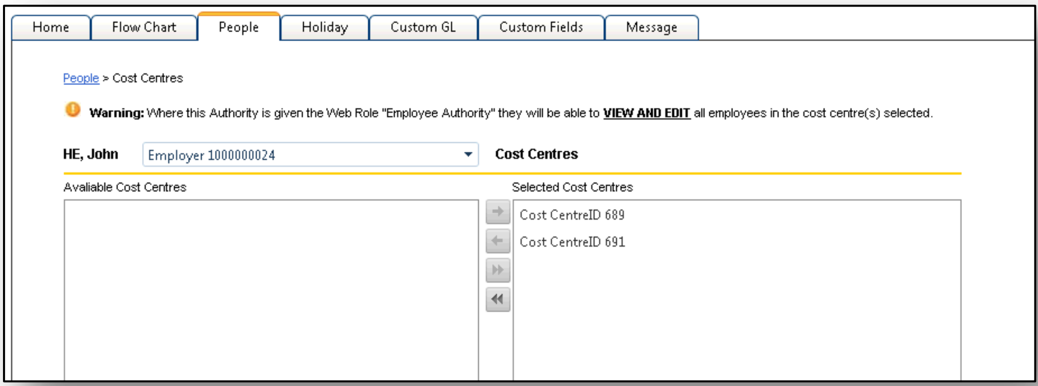


Also, check that the appropriate cost centres have been assigned to the person.

That way, the person will be able to view the employee details belonging to those chosen cost centres.

To check if the cost centres have been applied go to:

Administration>People>…client name…>Cost Centres>Save Changes



If the cost centres have not been selected, choose them from the available list and click the appropriate arrow button, then save changes.

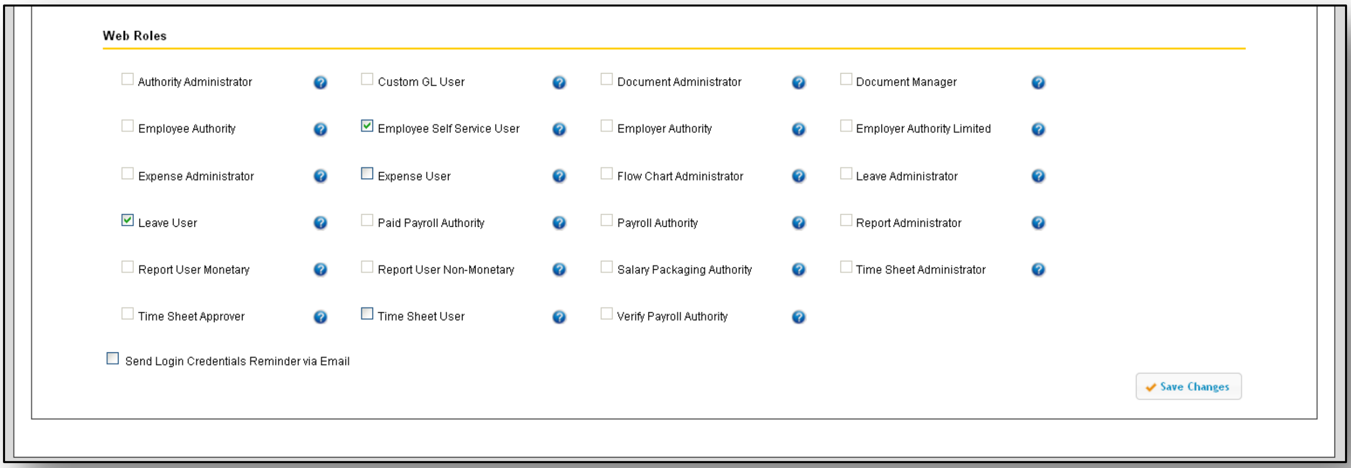
STEP 3: Assign Web Roles to Employees

Now that the web roles have been established for the employer and Person, access needs to be provided to the employees so that they can access their own account and submit any combination their leave, timesheets and expenses online. To do this, go to:

Open Client>Employees>Edit>Personal Details>ESS>Leave User/Timesheet User

The employer will have access to assign the leave (and expense) paycodes to employees. The employees will be able to apply for leave and expense reimbursement once the paycodes have been assigned and after being attached to a flow chart.

To assign the leave (and expense) paycodes, simply go to *Employees>Edit>Payment and assign the web role* and select the appropriate web role for each employee.

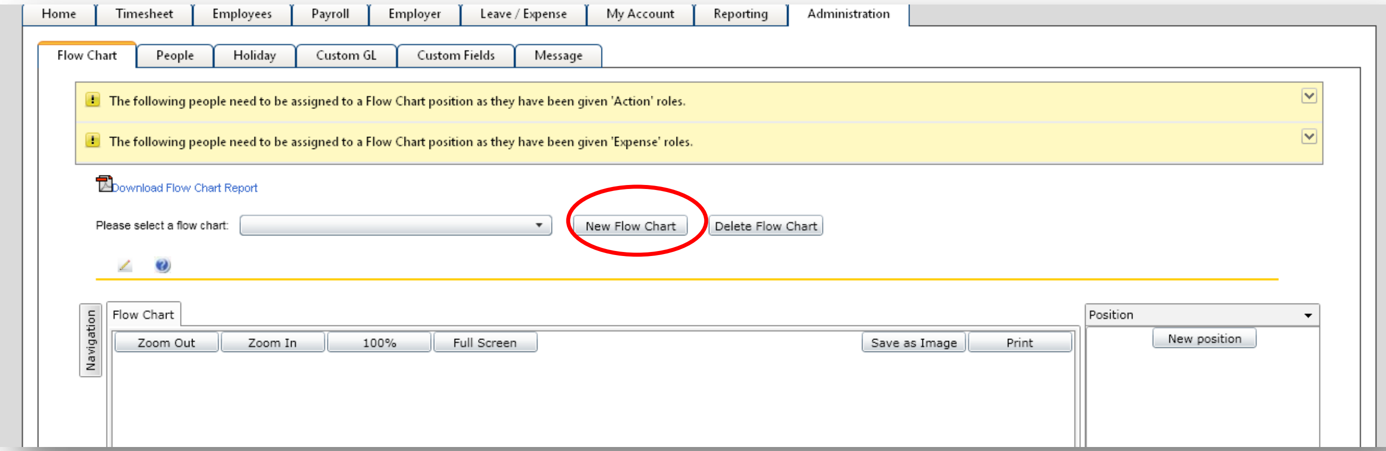


STEP 4: Create the Flow Chart

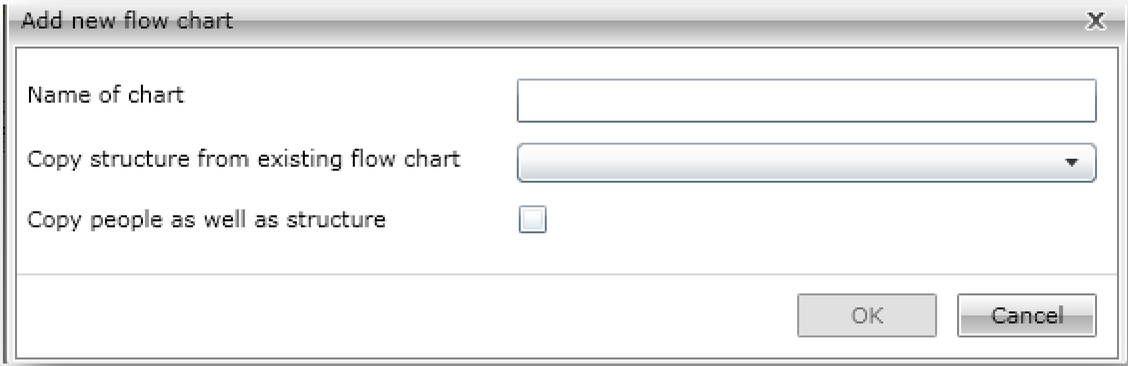
Successful completion of the previous Step 3 will now allow you to create a flow chart.

A flow chart is a graphical representation of the flow or process that an application form will take. Escalation positions (i.e. the position that an application escalates to can be sent to the Top Node, Next position or a Selected Position. The employer also has the option to copy a pre-existing flow chart making light work of this process. To create the flow chart, go to:

Open Client>Administration>Flow Chart>New Flow Chart>...name...>...copy from...>



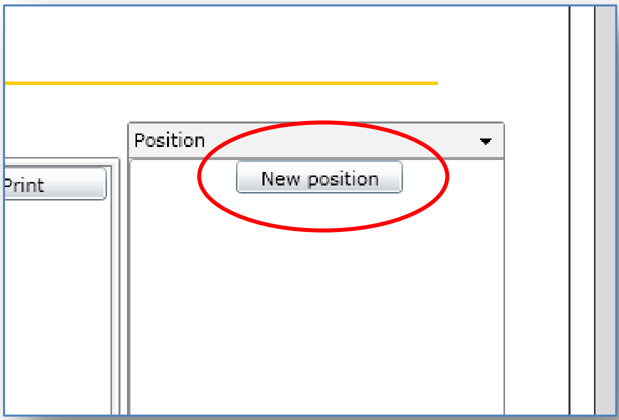
It is on this screen that employer can take the opportunity to copy a pre-exisiting flow chart.



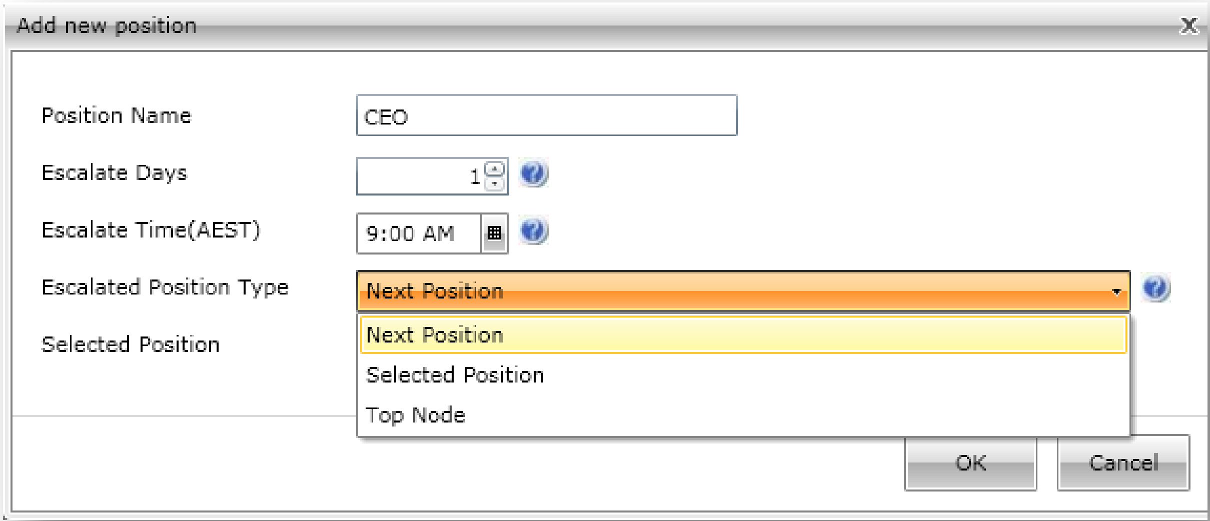
Your new flow chart is now ready to have positions created.

STEP 5: Create the Positions

Open Client>Administration>Flow Chart>New Position>Position Name>Escalation Days>Escalation Time>Escalation position>Drag & Drop

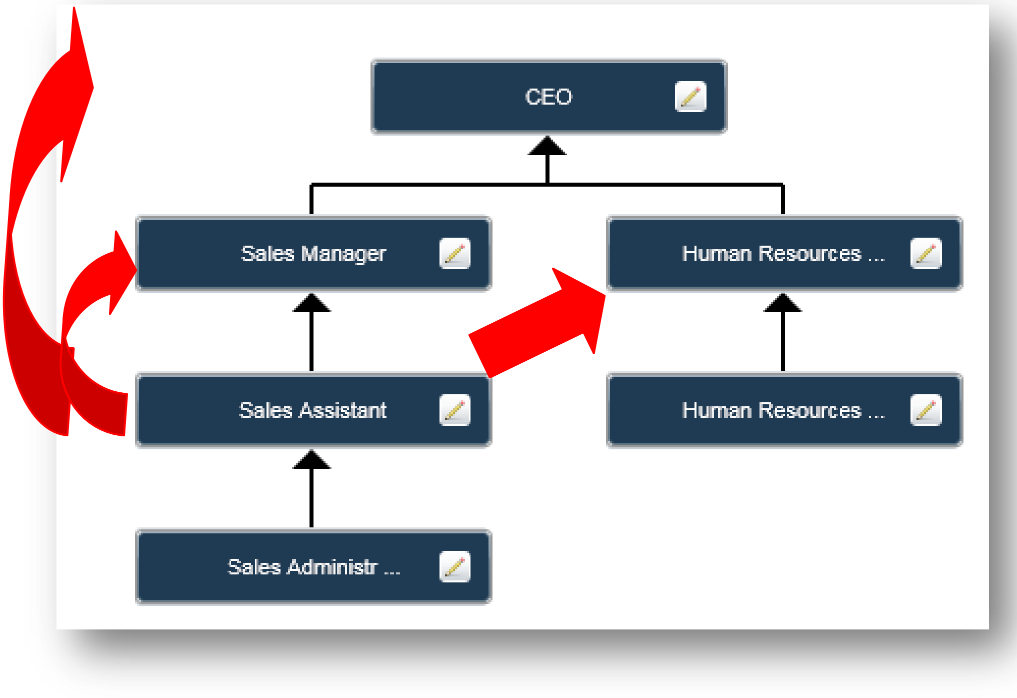


Hint! You will need to create the Top Node position first!



Escalation position Type	Description
Escalation Days	This is the set number of calendar days after which time, the online application form is sent to the escalating position. The days are defaulted to 3. However you can edit the number of days to suit.
Escalation Time	This is a specified time that the online application form is sent to the escalating position.
Escalation position Type	**Description**
Next position	The reporting position
Selected position	Select a position separate to the normal flow
Top Node	The highest position on the flow chart

Example: For escalation purposes only



In the diagram above, using the Sales Assistant as an example:

The Top Node for escalation purposes is the CEO (The highest position)

The Next Position for escalation purposes is the Sales Manager,

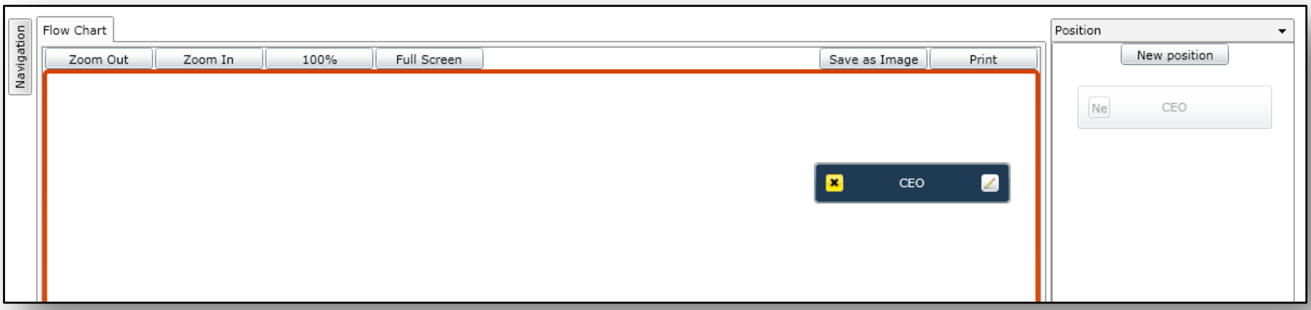
The Selected Position for escalation purposes is any other position including:

- ✓ **Sales Administrator,**
- ✓ **Sales Manager,**
- ✓ **CEO,**
- ✓ **Human Resources Manager**
- ✓ **Human Resources Assistant**

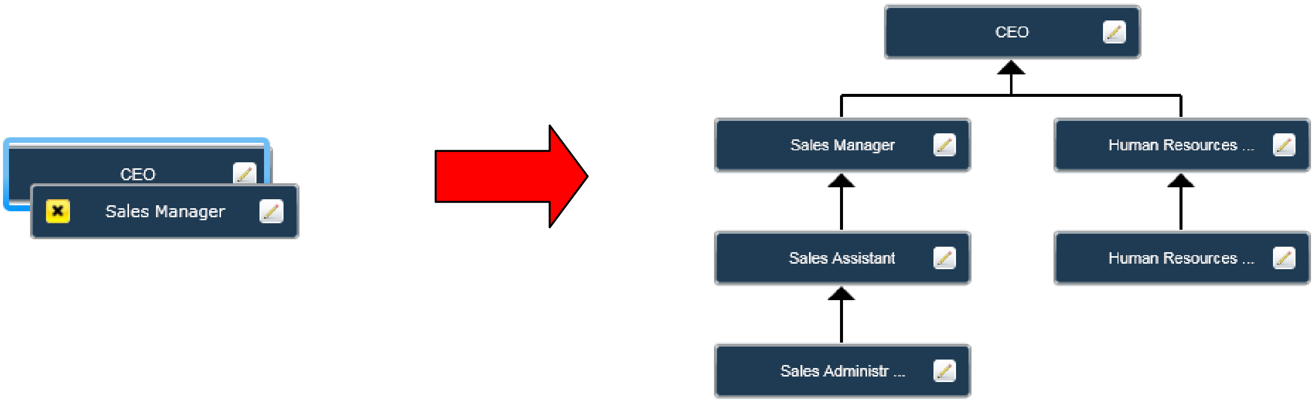
Warning: it is not good practice to escalate all online application forms to the Top Node.

Take advantage of the ability to select a different position to escalate & receive the application, such as Human Resources Manager!

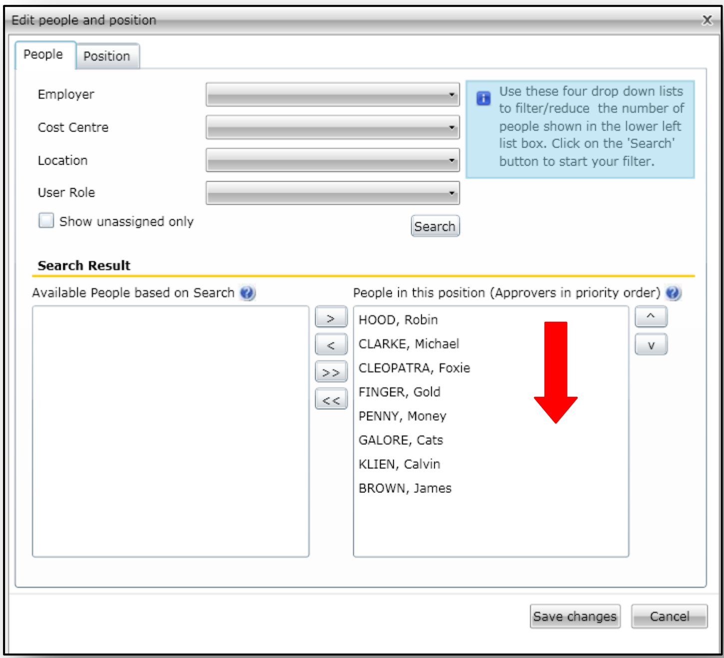
Once the position has been created, ***drag & drop*** the position from the position column to the flow chart



Repeat for each other position, ensuring that the position box is blue ***prior*** to releasing the position.



Positions can not only have ***multiple employees*** within it such as a Sales Team position, ***including positions that approve leave.*** In these instances, the escalated application will go to the approver with the highest priority first, then 2nd priority and so on. Please review the diagram below:



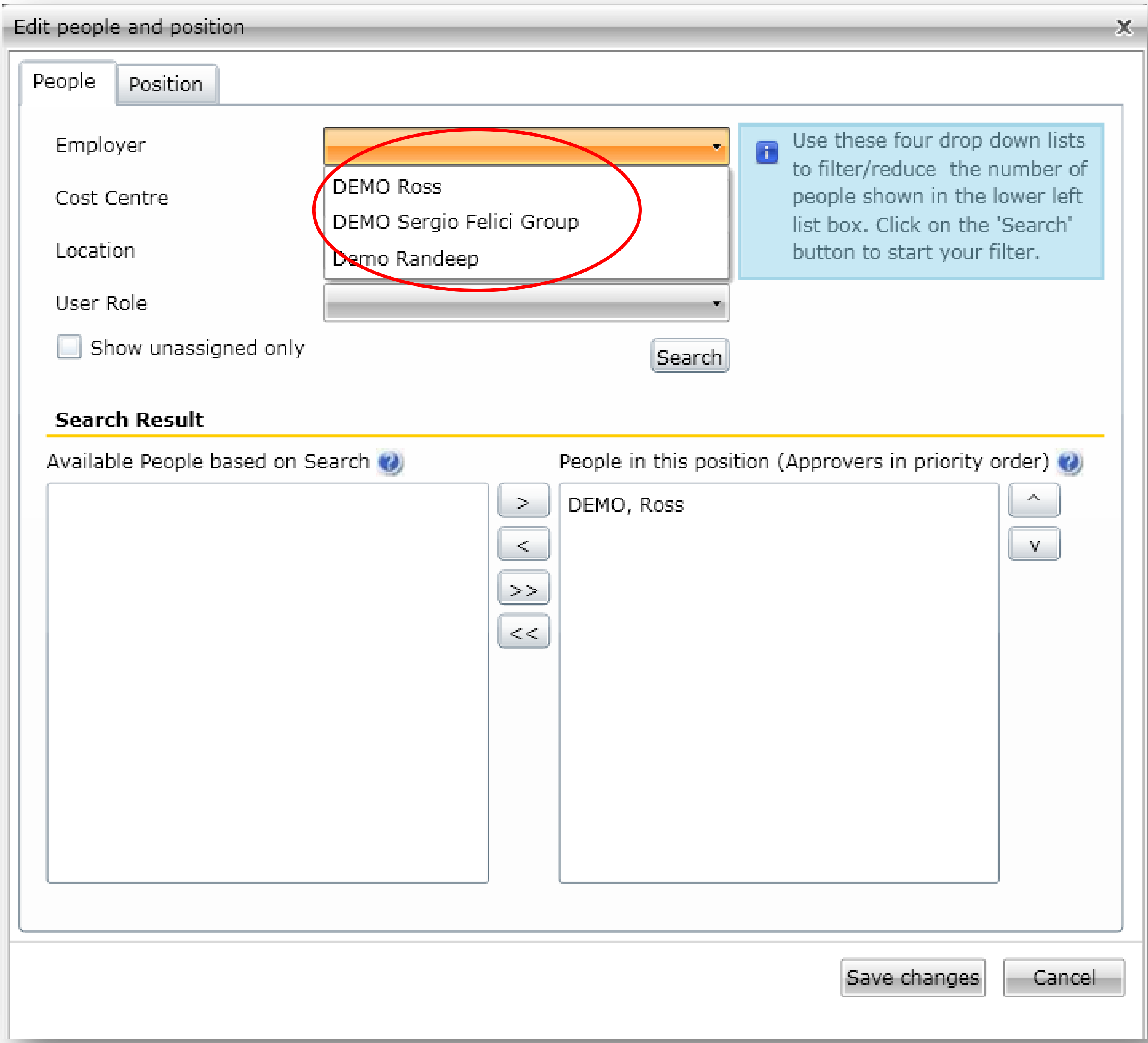
Multiple Companies

Approvers (including people who are not paid by the Employer) can now approve leave across multiple companies without the need to place the approver on as an employee.

If your company is part of a group of companies, then the associated companies will appear on the Employer drop down box accordingly.

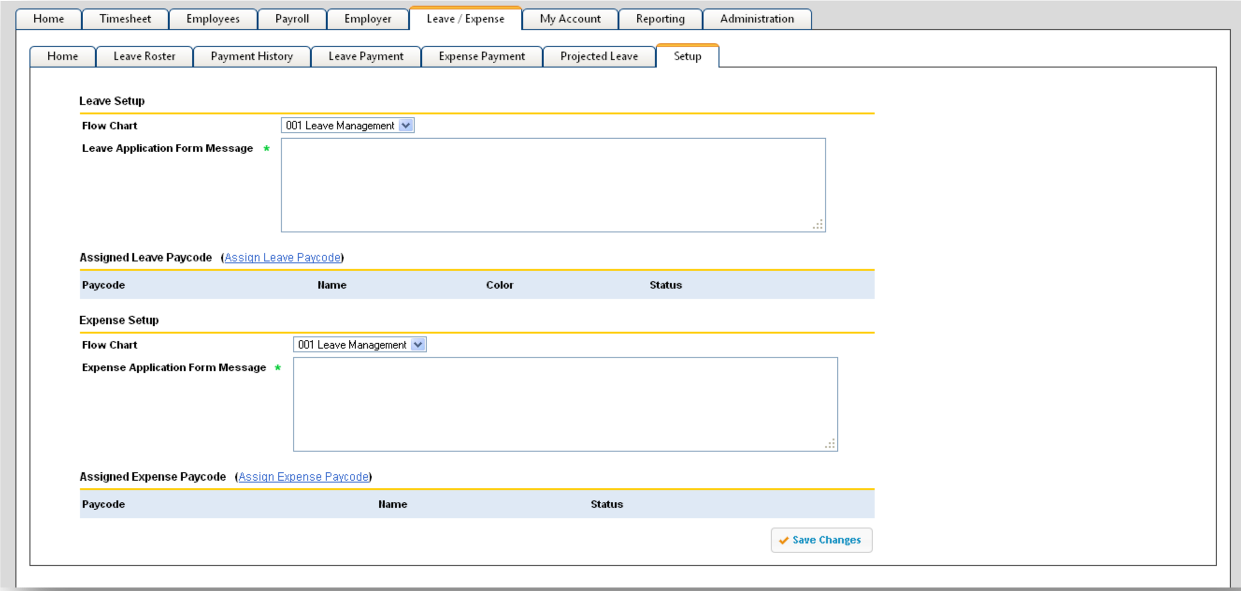
Select the company to search its employees to assign to the position.

> ***Tip! :*** You can narrow your search field by choosing the cost centre and/or location and by selecting the 'Show unassigned only' box.


Edit people and position
People
Position
Employer
Cost Centre
Location
User Role
DEMO Ross
DEMO Sergio Felici Group
Demo Randeep
Use these four drop down lists to filter/reduce the number of people shown in the lower left list box. Click on the 'Search' button to start your filter.
Show unassigned only
Search
Search Result
Available People based on Search
People in this position (Approvers in priority order)
DEMO, Ross
Save changes
Cancel

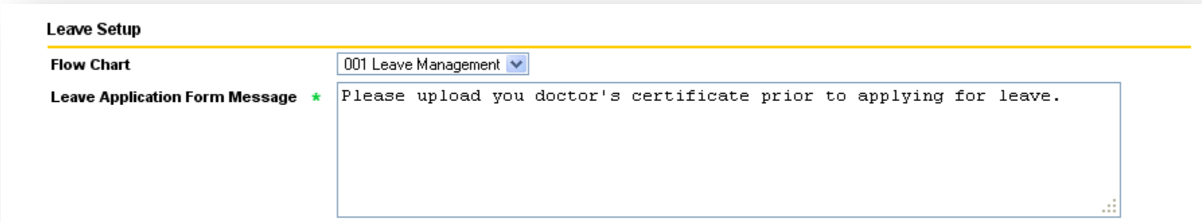
STEP 6: Create the Leave/Expense Setup

Open Client>Leave/Expense>Setup>Select Flow Chart



Feel free to write an appropriate message that will appear on the online application form.

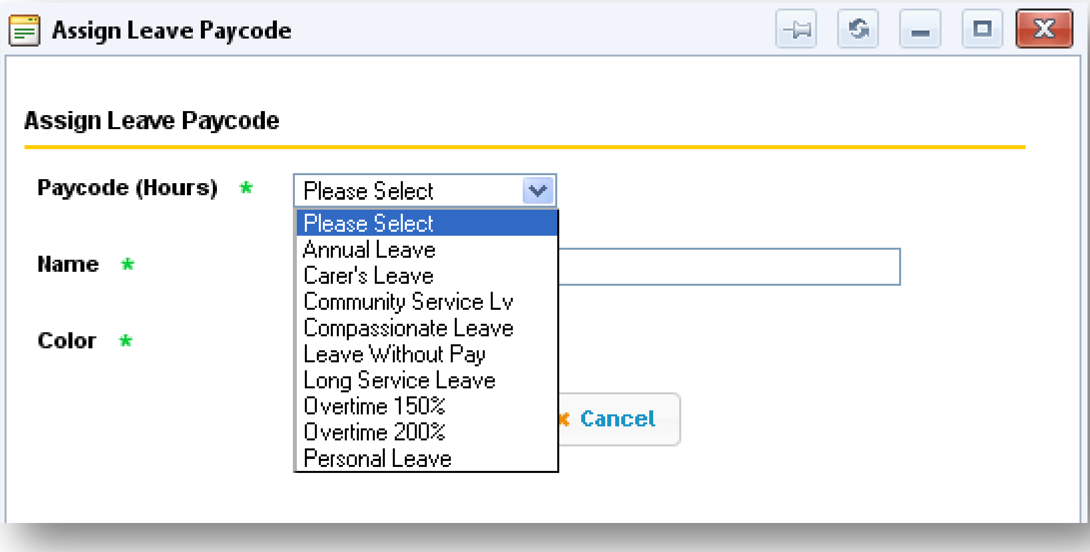
To do so go to: *Leave Application Form Message>…message…>Save Changes*

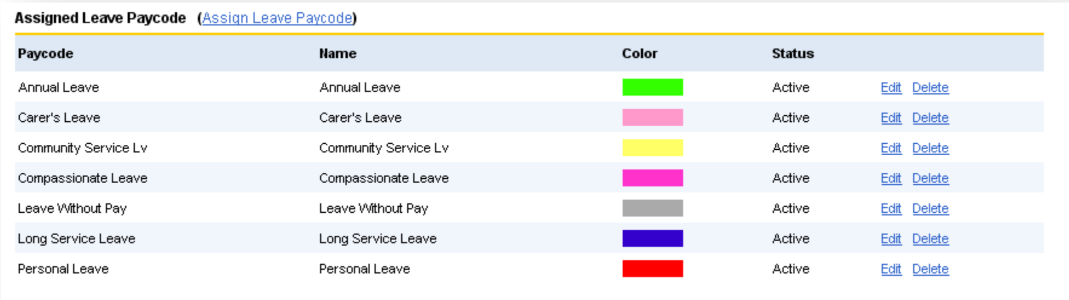


Assign Leave Paycodes

Choose a leave paycode from the drop down box and assign a colour.

This will be used as a colour legend within the Leave Roster.





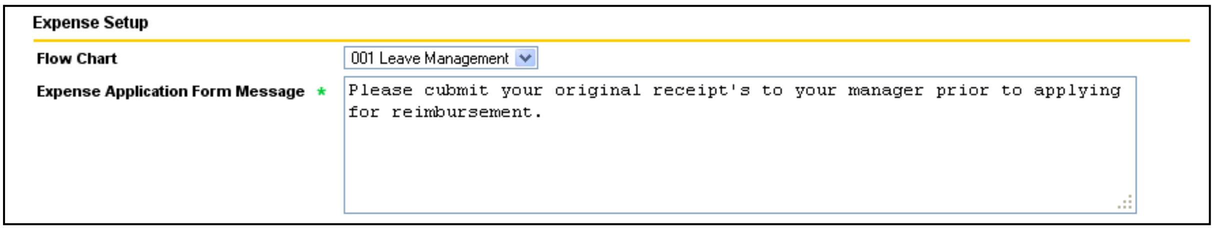
Assigned Leave Paycode (Assign Leave Paycode)

Paycode	Name	Color	Status	
Annual Leave	Annual Leave		Active	Edit Delete
Carer's Leave	Carer's Leave		Active	Edit Delete
Community Service Lv	Community Service Lv		Active	Edit Delete
Compassionate Leave	Compassionate Leave		Active	Edit Delete
Leave Without Pay	Leave Without Pay		Active	Edit Delete
Long Service Leave	Long Service Leave		Active	Edit Delete
Personal Leave	Personal Leave		Active	Edit Delete

Expense Setup

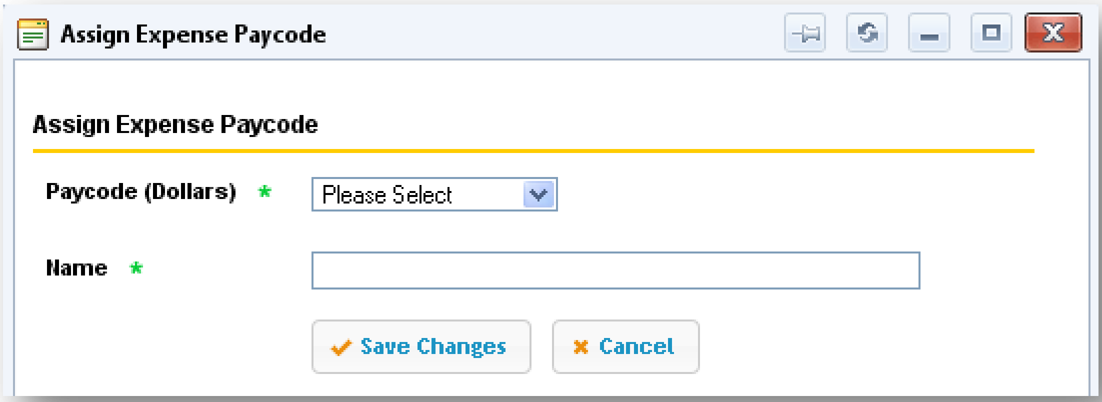
Select the flow chart to apply to the process for expense reimbursement.

Enter the message that will appear to employees on the expense application form.



Assign the Expense code

This will make the code available in the drop down box within the online application form.



Save Changes