LEAVEPRO™
SELF-SERVICE APPLICATION OVERVIEW

February 2013
Reed Group Product Management

Self Service Application Features

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  - Employee Page
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    - Leave Summary
    - Leave Detail
- My Reports
  - Subscription Reporting
  - Ad-Hoc Reporting
- Administrator Tab (Site Administrator)
  - Manage Users
    - Defining Roles/Permissions
    - **Re-setting User Passwords**
  - Employee Data Access
  - Manage SSO Role Groups

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GETTING STARTED

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Getting Started

Logging in

- All Roster employees may create a login to the Self Service Application
  - All users have employee only permissions
  - Expanded permissions are established by Site Administrator
- Non- Roster users may be granted access by the Site Administrator
- If Single Sign On is established then this step is by-passed

Getting Started

Logging in

- New User Registration
  - Validation against Roster
  - Non-Roster user access must be granted by Administrator
- Forgotten user ID
- Forgotten Password

Getting Started

Forgot User ID or Password?

Login Page

- Roster Employees Only
  - Forgot your User ID
    - Click link from login page
      - Enter your Work Email Address
      - Birth Date
      - Home Address Postal Code

  - Forgot your Password?
    - Click link from login page
      - Enter your Work Email Address
      - Birth Date
      - Home Address Postal Code

- Non-Roster Employees
  - You can obtain your User ID from your Site Administrator
  - Your Site Administrator can Re-set your Password

Getting Started

Landing page

Roster User

- All roster users will land on their Employee page

Non-Roster User

- All non-roster users will land on the general Home page

GENERAL SETTINGS & FEATURES
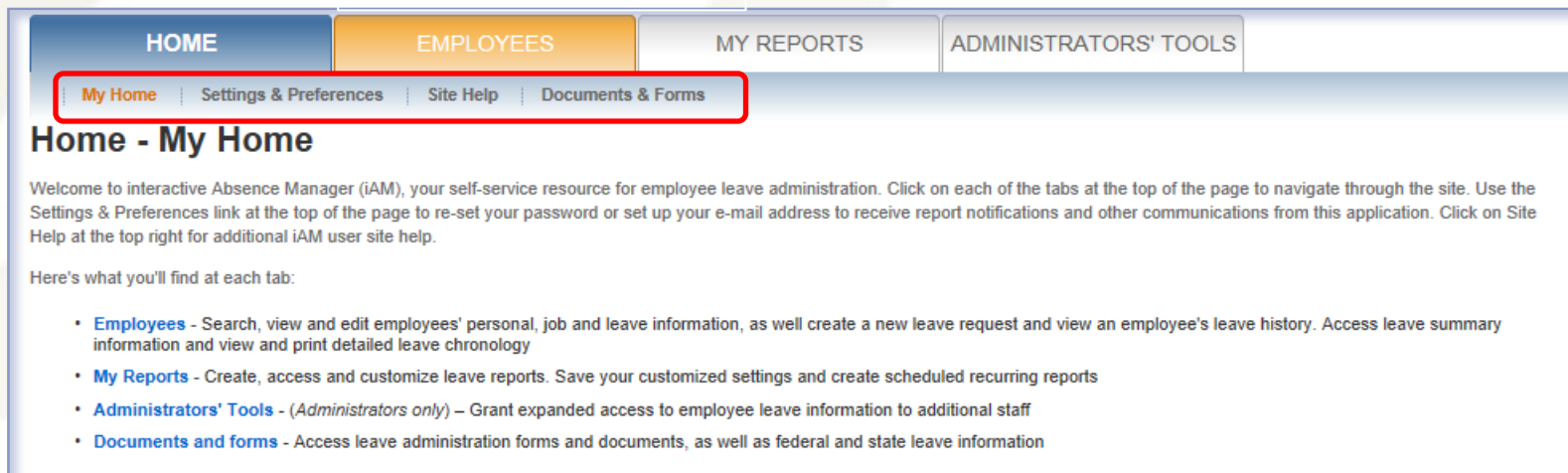
General Site Settings & Features

Site Header

Home - My Home

- Setting & Preferences
- Site Help
- Documents & Forms

Logged in as: KENNETH AMES | Documents & Forms | Settings & Preferences | Site Help | Log Out

Today is Friday, January 20, 2012; Last log in on January 20, 2012 at 08:15 AM GMT-7

| HOME | EMPLOYEES | MY REPORTS | ADMINISTRATORS' TOOLS |

My Home | Settings & Preferences | Site Help | Documents & Forms

Home - My Home

Welcome to interactive Absence Manager (iAM), your self-service resource for employee leave administration. Click on each of the tabs at the top of the page to navigate through the site. Use the Settings & Preferences link at the top of the page to re-set your password or set up your e-mail address to receive report notifications and other communications from this application. Click on Site Help at the top right for additional iAM user site help.

Here's what you'll find at each tab:

- **Employees** - Search, view and edit employees' personal, job and leave information, as well create a new leave request and view an employee's leave history. Access leave summary information and view and print detailed leave chronology
- **My Reports** - Create, access and customize leave reports. Save your customized settings and create scheduled recurring reports
- **Administrators' Tools** - (*Administrators only*) – Grant expanded access to employee leave information to additional staff
- **Documents and forms** - Access leave administration forms and documents, as well as federal and state leave information

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General Site Settings & Features

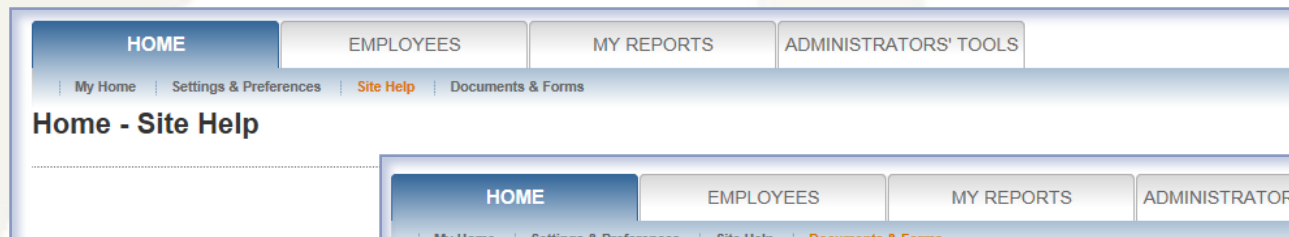**Setting & Preferences**

- Change password

- Change e-mail

General Site Settings & Features

Site Help & Documents and Forms

- Administrator specific content can be added to the following screens
  - Site Help
    - Administrator Contact Information
  - Documents & Forms
    - Policy Documents
    - General Forms

EMPLOYEES

Employees

Employee Search

Access granted by permission

– Roster Employees

– Non-Roster Users

Employees

Employee Page

- Available Actions

  - View the employee's personal and job information

  - View Leave Plan Balance Sheet

    - List of applicable Leave Plans

    - Time Used and Remaining

  - Access the employee's leave record

  - Request a new leave

  - Extend or change leave dates for an existing leave

  - Cancel a leave that has not yet started

  - Report intermittent time for an open approved intermittent leave

  - Confirm a return to work date

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Employees

Create New Leave

- Select Create New Leave Request link
- Select Leave Reason

Employees

Create New Leave

– Leave Reason Details
  • Vary by Leave Reason

Employees

Create New Leave

- Leave Dates
- Missed Work Type

Create New Leave

- – Leave Summary & Confirmation

- • Note: Leaves entered with overlapping continuous dates will be saved as an Incomplete Leaves

Employee Page

- Open Leaves
  - Click on Leave ID link

- Incomplete Leaves
  - Contact administrator to complete intake

Leaves of Absence		Create New Leave Request			
Open Leaves					
☆ *Time Off Requests can be made by clicking on an open leave.*					
Leave ID	**Description**		**Reason**	**Start Date**	**End Date**	
571206418067	Injury		Employee Health Condition	01/17/2012	01/23/2012	
Incomplete Leaves					
Leave ID	**Description**		**Reason**	**Start Date**	**End Date**	
930728956813	injury		Employee Health Condition	01/17/2012	01/20/2012	continue...

- Leave Plan Balance Sheet
  - View overall usage as of today

Leave Plan Balance Sheet				
Leave Plan Name	**Entitlement Amount**	**Used**	**Remaining**	**Leave Reasons**
Federal Care of Service Member	26 wk	0	26	Family Injured Service Member
Company Personal	90 dd	0	90	Personal
Short Term Disability	182 cd	0	182	Employee Health Condition,Pregnancy/Maternity
NM Alternative Leave	14 dd	0	14	Alternate State Leave - Family,Alternate State Leave - Self
USERRA	5 yy	0	5	Emergency Active Duty,Enlistment,Reserve Duty
Family Medical Leave Act	12 wk	0.8	11.2	Adoption,Care for New Born,Employee Health Condition,Family Health Condition,Family Military Exigency,Foster Care,Pregnancy/Maternity,Work Related Illness/Injury
Long Term Disability	Unlimited	0.8		Employee Health Condition,Long Term Disability
Company Family Care	3 wk	0	3	Family Health Condition

Employees

Leave Detail

Available Actions

- Prior to Determination

  - Cancel Leave

- Change facts of leave (update leave details page)

- Change dates of Leave

- E-mail Leave Manager

- Print Leave Details page

- Submit request for Intermittent Time Off

- View Status

- View Notifications

  - sent to user logged in

| Employee Summary | Change dates of leave | Change facts of leave | Cancel leave

Thomas Ciancia - Leave of Absence: #930728956813

Please review the information below regarding the employee's leave. If this is an open leave, you may cancel the leave (if yet not started) or change the leave dates under certain circumstances. applicable, you may also report intermittent time or confirm the employee's return to work date by clicking on the active (blue) links below.

< go back to employee summary

Date Received: 01/20/2012
Employee Health Condition: injury, (Open) Cancel leave Change facts of leave
Time Period: 01/17/2012 - 01/20/2012 Change dates of leave
Leave Type: Intermittent Leave
Leave Manager: Devin Mills, dmills@rgl.net
Available Actions: Print leave details

Hours Summary (as of 01/20/2012)

Hours used:		Hours available:	
Family Medical Leave Act	32	Family Medical Leave Act	448

Time Off Requests (as of 01/21/2012)

There are currently no time off requests to display. To request time off, enter the date you wish to request off and click New Time Off Request below.

Date of requested time off ★ [▼]   [New Time Off Request]

Leave Summary

Last Day Worked: 01/16/2012
Estimated partial return to work: not supplied
Actual partial return to work: not supplied
Estimated full duty return to work: not supplied
Actual full duty return to work: not supplied

From Date	To Date	Determination	Reason	Leave Type	Leave Plan(s)
01/17/2012	01/20/2012	Eligible		Intermittent Leave	Family Medical Leave Act

Forms and Notifications

📄 Eligibility
   Sent to Kenneth Ames on 01/20/2012

All forms and notifications are in PDF format. If you do not have Adobe Acrobat Reader, you may download it by clicking the link below.

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MY REPORTS

My Reports

Operational Reports

Available Actions

- Access granted by permission
- Create Report Subscription
  - Set recurrent report parameters
- Ad-hoc Report
  - Set one time report parameters

My Reports

Subscription Report

Setting Report Types, Parameters, Recurrence

- Select Report Type
- Parameters
  - Set Start & End Dates
  - Leave Reason
  - Missed Work Type
  - Location
  - Visibility As
  - Visibility Options
  - Division
  - Leave Status (open/closed)
- Schedule Recurrence
- Confirmation

My Reports

Ad Hoc Report

Setting Report Types & Parameters

- Select Report Type
- Parameters
  - Set Start & End Dates
  - Leave Reason
  - Missed Work Type
  - Location
  - Visibility As
  - Visibility Options
  - Division
  - Leave Status (open/closed)
- Confirmation

SITE ADMINISTRATOR TOOLS

Administrator Tools

Administrators' Tools - Home

- Access granted by permission
- Manage Users
  - Create non-roster users
  - Grant permissions for all users
  - Reset Passwords
- Employee Data Access (expanded visibility across employees)
  - Establish Peer Relationships
- Define SSO role groups (if applicable)

Administrator Tools

Manager Users

Create a Non-Roster User

- Click Manage Users
- Validate user has not already created
  - Find User
- Create New User
  - First Name
  - Last Name
  - Email
  - User Name
  - Password
- Click Create User

| Employee Data Access | Manage Users | SSO Role Groups |

Manage Users

The "Manage Users" tool enables an Administrator, to create and manage user accounts and grant specific ac user account for an individual who is not on the eligibility file / third party user and grant them access rights an

Here you can:

1. Create a new user account
2. Re-set pass-words for user
3. Activate or inactivate user account
4. Enable or remove user roles
   1. Grant administrative rights to another user
   2. Grant unrestricted access to employee leave information
   3. Grant full or read-only access

If you wish to change a user's role or access, enter the first name, last name, e-mail address or username to s and password.

Find a User

Find: tch   [Go]

Create a new user >>

1 results returned.

Tcherkassova, Farida
Username: FTcherkassova
Email: FTcherkassova@reedgroupdemo.com

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Administrator Tools

Manager Users

Define/Manage Permissions/roles

- From the Create New User page OR
- Return to the page by
  - Click Manage Users
  - Find User
- Check the appropriate box(es) under Application Roles

| Employee Data Access | Manage Users | Edit User | SSO Role Groups

Edit User: Farida Tcherkassova

Name: Farida Tcherkassova
Username: FTcherkassova
Email: FTcherkassova@reedgroupdemo.com

< Select a different user

Use the sections and fields below in order to add or remove roles for this user, change or reset this user's password.

Application Roles

Use the checkboxes below in order to add or remove application roles for this user.

☑ User is Active (User may login)
☐ Self Service Admin
☐ Self Service Cancel Leave
☐ Self Service Determine Leave
☐ Self Service Edit Job Info
☐ Self Service Edit Personal Info
☐ Self Service Edit Work Schedule
☐ Self Service Employee Search
☐ Self Service Enter Leave
☐ Self Service Leave Change
☐ Self Service Manage Peer Relationships
☐ Self Service Manage Role Groups
☐ Self Service Manage Users
☐ Self Service Operational Reports
☐ Self Service ReadOnly
☐ Self Service Unrestricted Visibility
☐ Self Service View Leave Detail

Manual Password Reset

Click on "copy to clipboard" to copy the suggested password and then paste it (Ctrl + v) into the password boxes. Please record the password so you can communicate it to the user as the new password will not be visible once you click on "Reset Password"

Suggested Password: Mo24Xtd1   copy to clipboard

New Password:

Confirm Password:

Reset Password

Administrator Tools

Manager Users

Reset Passwords

- From the Create New User page OR
- Return to the page by
  - Click Manage Users
  - Find User
- Enter New Password
- Confirm Password
- Click Reset Password
- Notify user of their new Password

| Employee Data Access | Manage Users | Edit User | SSO Role Groups

Edit User: Farida Tcherkassova

Name: Farida Tcherkassova
Username: FTcherkassova
Email: FTcherkassova@reedgroupdemo.com

< Select a different user

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Application Roles

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☐ Self Service Edit Work Schedule
☐ Self Service Employee Search
☐ Self Service Enter Leave
☐ Self Service Leave Change
☐ Self Service Manage Peer Relationships
☐ Self Service Manage Role Groups
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Suggested Password: Mo24Xtd1   copy to clipboard

New Password:
[_____]

Confirm Password:
[_____]

Reset Password

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Administrator Tools

Employee Data Access

- Expand employee visibility
  - Establish Peer Relationships across Supervisors, HR, Global Users
    - User can see employees that report to another User

Administrator Tools

Manage Single Sign On (SSO) Role Groups

– Role groups are used when SSO is in place for Administrator

– Administrator defines user permissions and passes those permissions through SSO