LEAVEPRO™
SELF-SERVICE APPLICATION OVERVIEW

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Reed Group Product Management
Self Service Application Features

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- General Site Settings & Preferences
- Employees
  - Employee Search
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    - Create New Leave
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- Administrator Tab (Site Administrator)
  - Manage Users
    - Defining Roles/Permissions
    - Re-setting User Passwords
  - Employee Data Access
  - Manage SSO Role Groups
GETTING STARTED
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?

- 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
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
Access granted by permission

- Roster Employees

- Non-Roster Users
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
Employees
Create New Leave

- Select Create New Leave Request link
- Select Leave Reason
– Leave Reason Details
  • Vary by Leave Reason
Employees
Create New Leave

- Leave Dates
- Missed Work Type
Employees
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

- Leave Plan Balance Sheet
  - View overall usage as of today
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
MY REPORTS
Available Actions

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