WESTERN SYDNEY UNIVERSITY





ALESCO HRMIS V17

VERSION 1.0 TEAM LEADER ACCESS GUIDE

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HR Systems
Information Technology & Digital Services

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TEAM LEADER ACCESS

The Team Management pages allow designated users within the University the ability to access details relating to employees within their team or organisational unit.

If a Team Leader has access assigned via the organisation's 'reports to' structure, they will be able to view a list of all team members who are below the leader in the organisation hierarchy structure.

Team Leaders assigned access via Organisational Unit (Clevel) profiles (Admin Team Leader) will be provided with a list of team members that contains all of the employees that are currently within the specified Clevels.

The types of information available via the team management reports are leave bookings, leave balances, birthdays, increments etc.

The Team Leader can also choose a team member to change the view to and then access information about that team member. For example, a Team Leader can choose a member of their team and check to see what the team member's leave balance is before approving any leave transactions.

Regardless of the type of access you have been assigned, the functionality will be basically the same. There will however be a slight difference in the way that the team members list is displayed. The following section will show both of the screen displays that may be encountered.

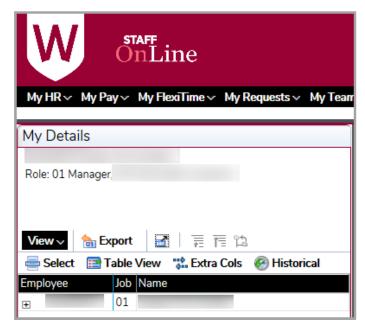
MY DETAILS

This section of the panel displays the user ID, name, active job and position description of the logged in user. If the active job is changed, as outlined below, it will be updated in this section.

By default for Team Leaders with 'reports to' access, only active jobs are listed under the 'My Details' section of the user panel. However in-active jobs may still be accessed by clicking the 'historical' button to show/hide old jobs.

If a user has no current jobs, the My Details list will only show their Employee row (ie, no Job/Role rows).

For Team Leaders with 'admin' access, all jobs will be listed.



View – The options available under this list will depend upon the type of team access the leader has i.e. reports to or admin. It includes options to display additional columns and to reorder columns. Additionally, for the 'reports to' team leader, they can select options to expand or collapse all or selected levels of the team tree structure.

Please note: Where the Team Leader has their User Preference set to drill down to 1 level only, the Team List will only populate to that one level.

For the 'admin' team leader, the View options include the option to open/close the Query By Example.

- **Export** click on this button to display the current table data in XLS format for saving and/or opening in an Excel spreadsheet.
- Show/Hide Extra Columns click on this button to display additional columns for Position, Position Title, Start Date, End Date, Organisation Level, Organisation Level Description, and Depth.
- Clear Team Member View When the view has been set to a team member, this icon will appear in the top section of the My Details panel to enable the user to clear the view of the team member and return to that of the logged in user.

For Team Leaders with 'Reports to' team list

- Show/Hide Historical Jobs click on this button to show/hide inactive jobs.
- Full Screen click on this button to allow the table to be viewed in a full-screen view. From this view, click the option again to return to the normal view.
- Go Up Used to navigate within the team tree structure. Click to move focus up one level in the structure
- Go to Top Used to navigate within the team tree structure. Click to move focus back to the top of the team.
- Show as Top Used to navigate within the team tree structure. Click to change the display so that a lower level team member as the top of the tree.

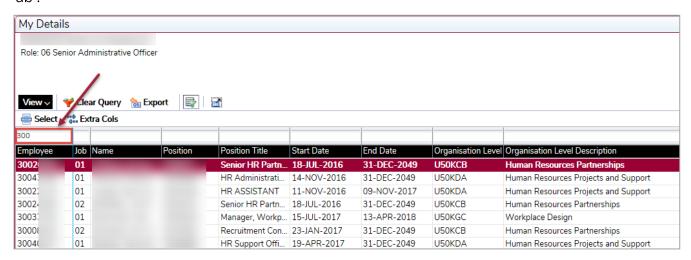
For Team Leaders with 'Admin' team list

- Query By Example click on this button to show/hide the entry fields to search records based on examples and locate employees and/or jobs within the team list.
- Clear Query click on this button to clear entries in the Query By Example fields and return to the original list of all records.

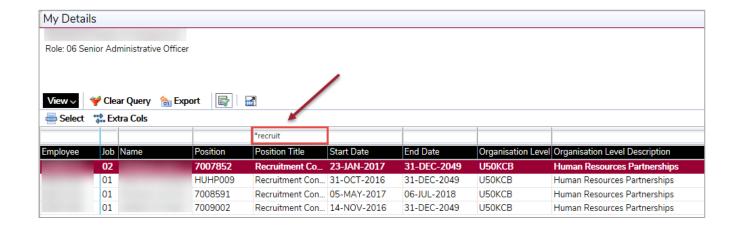
Hover over any column heading and the arrows will display. Select either A or vin any column heading to sort the data by that column in ascending or descending order.

Query By Example – this is a method of query to allow the user to search for data based on the example entered in the query field. The Query By Example is **not** case sensitive. Enter the query string in the corresponding field and hit enter.

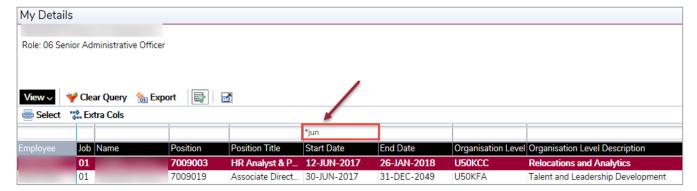
For example, the query below has returned all records with employee numbers beginning with 'ab'.



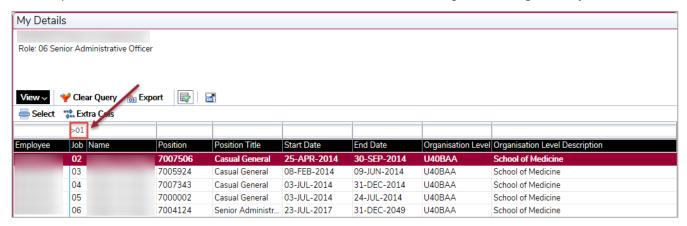
The wildcard character for the Query By Example is the asterisk *. Enter the wildcard at the beginning of the search string. For example, to search for all Recruitment type positions the string might be *recruit.



The wildcard is useful for searching for dates, e.g. *jun would return all dates in June.

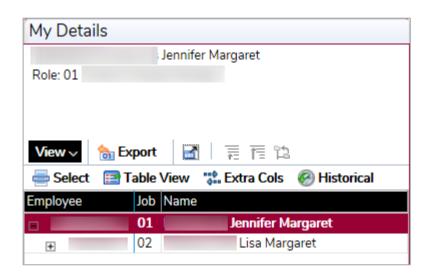


For simple numeric values the > and < characters can be used, e.g. searching for all jobs >01.

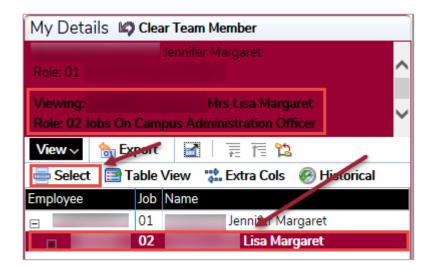


Viewing Team Members

My Details will display a list of all active jobs for the user. Navigation to team members is possible in several ways. To view pages in the context of a team member locate them in the team members list and click on the row in which they appear then click on the 'Select' button.



The following screen will then be displayed.

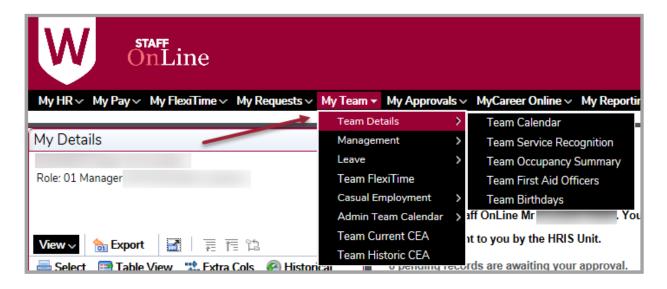


To return the view back to the team leader, click on the 'Clear Team Member' button 9 located in the top section of the My Details panel.



MY TEAM

Team Details

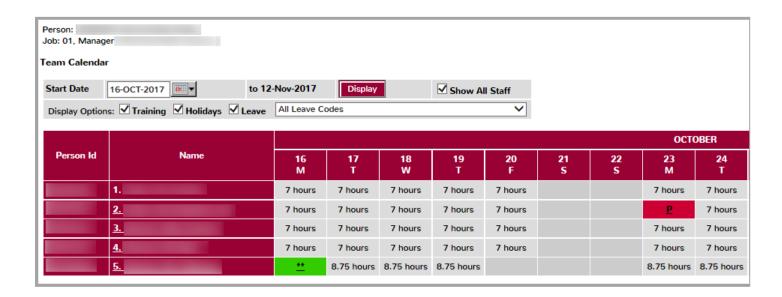


Team Calendar

The Team Calendar can be accessed from the 'Team Details' menu under 'My Team'. The Team Calendar will provide a calendar view of your team and will include details of the following events:

Leave

- Public Holidays
- Non Working days derived by referencing the employee rosters



The Start Date field will default to the current date and the matrix will display records between the dates shown. This display period is set by the systems administrator but may also be changed via the User Preferences link – see section below for further details. A scroll bar is available at the bottom of the screen to provide access to the whole period. The start date may be changed if wishing to review leave bookings for a different period.

By default all leave codes will be displayed, however if wishing to look at only one leave code, the code may be selected from the drop down list.

If any changes have been made to the selections above, click the Display button to refresh the information displayed.

Only a specified number of employees will be displayed per screen. If more records exist these can be displayed by using the buttons: First, Previous, Next and Last.

The number of records displayed per page is set by the systems administrator, but may be changed via the User preferences link - see section below for further details.

The calendar will display any leave bookings by leave type. The character within the box will specify the leave type and a legend is provided at the bottom left hand side of the screen.

The status of the leave bookings is differentiated by their display colour. The different booking statuses are as follows:

Legend:	Approved - Confirmed	Α	Annual
	Approved - Unconfirmed	н	Public Holiday
	Approved Pending Change	L	Long Service
	Approved Pending Different Dates	P	Paid
	Pending	S	Sick
	Pending - Deferred	T	Training
	Public Holiday	U	Unpaid
	Training Attended	**	Denotes various events exist for this day
	Training Waitlisted		

Approved - Confirmed The booking has been approved within Staff OnLine and also been approved for payment.

Approved - Unconfirmed Booking has been approved in Staff OnLine and transferred to the Alesco HRMIS, but has not as yet been activated for payment.

Pending Leave Request Request Request has been entered but is still awaiting approval in Staff OnLine.

Request has been entered but the approval decision has

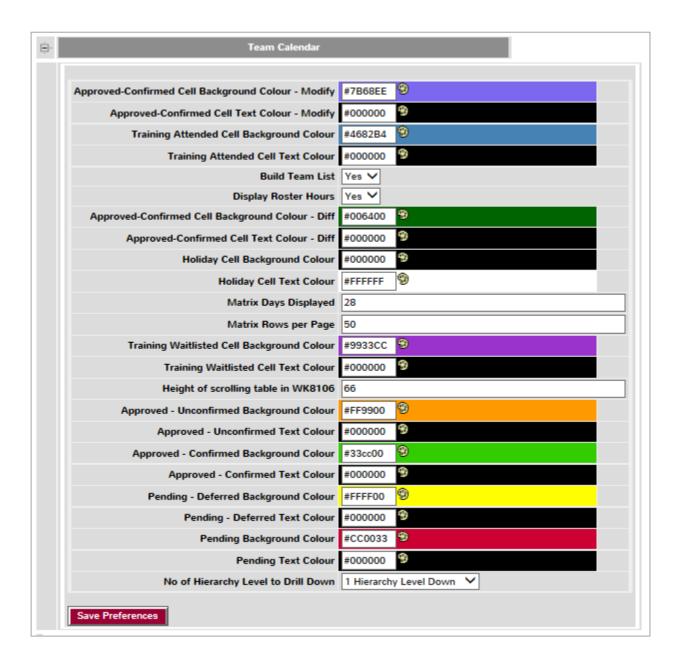
been deferred.

The colours used to differentiate the different booking statuses may be changed via the User preferences link, to meet your own particular requirements – please see below.

Team Calendar User Preferences

Deferred

A number of the display features within the Team Calendar may be set at individual user level via the User Preferences link that appears at the foot of the Team Calendar page. The following page will be displayed when you click on 'User Preferences'.



Matrix Days Displayed – This manages the number of days displayed across the calendar, it is not advisable to set this to greater than 365.

Matrix Rows per Page – This defines how many employees are displayed per page.

Background Colours & Text – The background colour and text colour can be changed for each of the leave status groups by simply clicking on the palette icon and selecting an alternative colour.

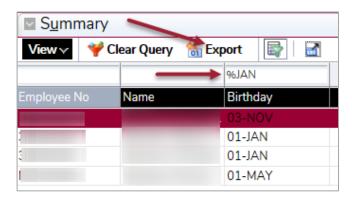
Save your preferences before exiting the screen.

Team Birthdays

The Team Leader is able to view the birthdays of the members of their team.

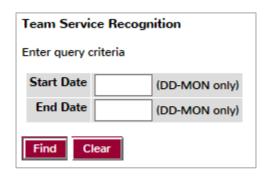
The information displayed on this screen can be exported to excel by clicking on the export button.

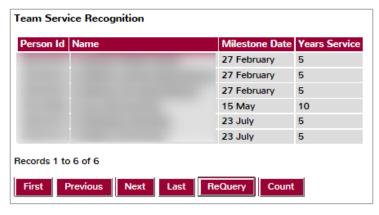
A Team Leader is able to filter the results by using the search fields above the column headings. For example, if you want to view birthdays during January only, you would enter %JAN in the date of birth search field and press enter to execute the search. The % symbol represents a wildcard.



Team Service Recognition

The Team Leader is able to view the upcoming service milestones of the members of their team. The report can be limited to start & end dates or the dates can be left blank to view all.





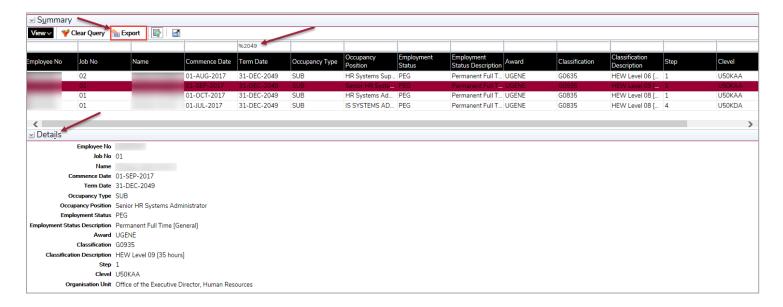
Team Occupancy Summary

This menu option gives the Team Leader the ability to view the 'profile' of the staff members in their team. It shows information such as employment status, occupancy start and end dates, position title, award, classification and step.

The information displayed on this screen can be exported to excel by clicking on the export button.

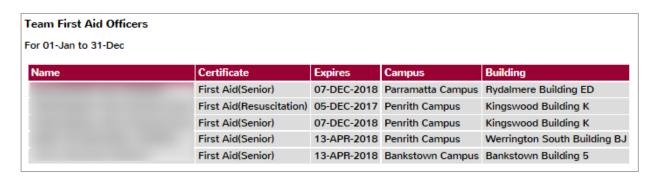
A Team Leader is able to filter the results by using the search fields above the column headings. For example, if you only want to view employees whose occupancy terminates in 2049, you would enter %2049 in the term date search field and press enter to execute the search. The % symbol represents a wildcard.

The details panel at the bottom of the screen shows the occupancy summary for the highlighted employee and can be expanded or hidden at any time.

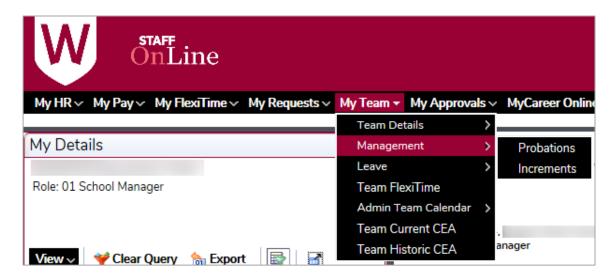


Team First Aid Officers

The Team Leader is able to view the recorded first aid certifications of the members of their team. The report can be limited to start and end dates or the dates can be left blank to view all.



MANAGEMENT



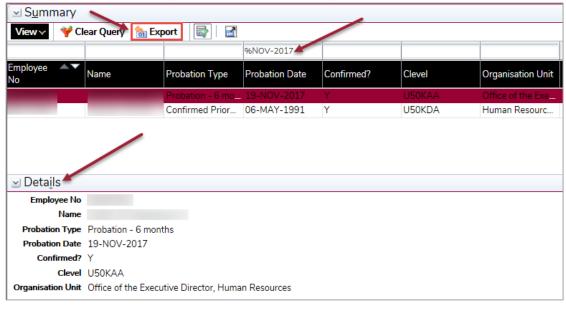
Probations

The probation screen shows the probation due date for all of your employees and if their probation has been confirmed.

The information displayed on this screen can be exported to excel by clicking on the export button.

A Team Leader is able to filter the results by using the search fields above the column headings. For example, if you only want to view employees whose probation due date is in November 2017, you would enter %NOV-2017 in the probation date search field and press enter to execute the search. The % symbol represents a wildcard.

The details panel at the bottom of the screen shows the probation summary for the highlighted employee and can be expanded or hidden at any time.



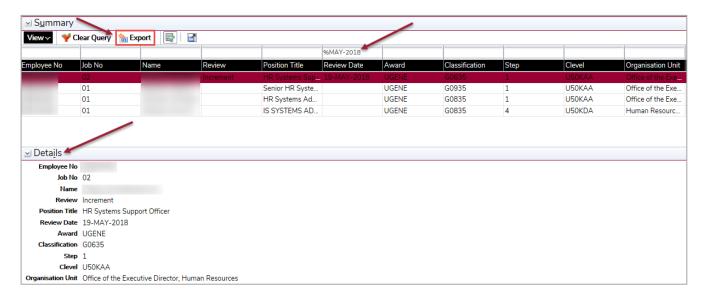
Increments

A Team Leader can view the Increments for their staff and the date they are due.

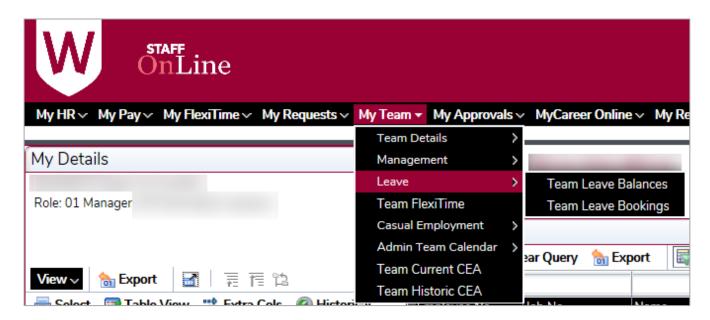
The information displayed on this screen can be exported to excel by clicking on the export button.

A Team Leader is able to filter the results by using the search fields above the column headings. For example, if you only want to view employees whose increment due date is in April 2015, you would enter %APR-2015 in the review date search field and press enter to execute the search. The % symbol represents a wildcard.

The details panel at the bottom of the screen shows the increment summary for the highlighted employee and can be expanded or hidden at any time.



LEAVE



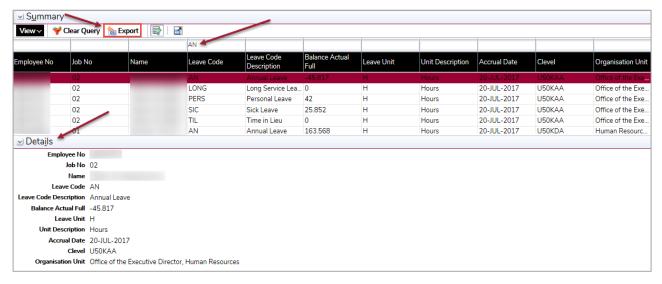
Team Leave Balances

The Team Leave Balances screen displays the leave balances for the current team members.

The information displayed on this screen can be exported to excel by clicking on the export button.

A Team Leader is able to filter the results by using the search fields above the column headings. For example, if you only want to view leave entitlements for annual leave, you would enter AN in the leave code search field and press enter to execute the search. The % symbol can be used when searching to represent a wildcard.

The details panel at the bottom of the screen shows the leave balances summary for the highlighted employee and can be expanded or hidden at any time.



Team Leave Bookings

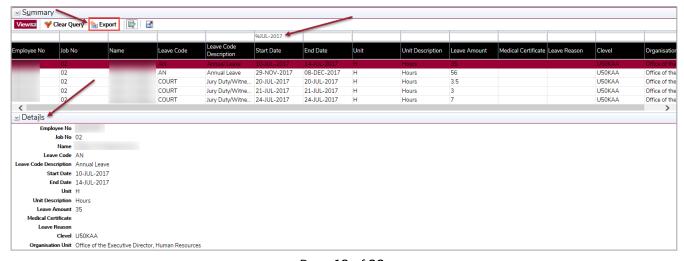
Team Leave Bookings reports the leave bookings for the current team members.

The information displayed on this screen can be exported to excel by clicking on the export button.

A Team Leader is able to filter the results by using the search fields above the column headings. For example, if you only want to view employees who commenced leave in July 2017, you would enter %JUL-2017 in the start date search field and press enter to execute the search. The % symbol represents a wildcard.

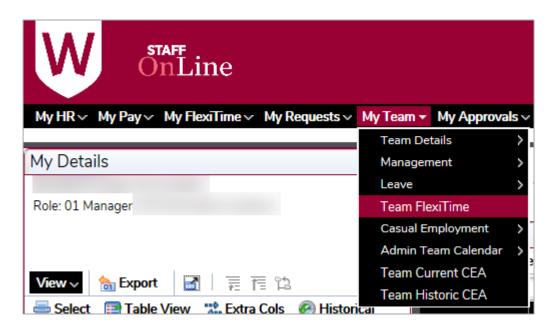
You will no longer be able to filter the leave bookings by a particular date range e.g. all employees who were on leave between 1 August 2017 and 30 September 2017. If you need to obtain this information, it is advised that you export the data to excel and then manipulate as required.

The details panel at the bottom of the screen shows the leave booking summary for the highlighted employee and can be expanded or hidden at any time.



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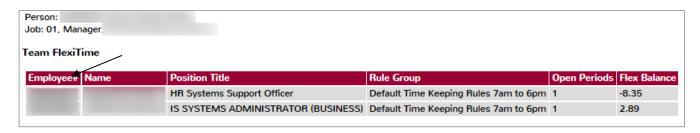
TEAM FLEXITIME



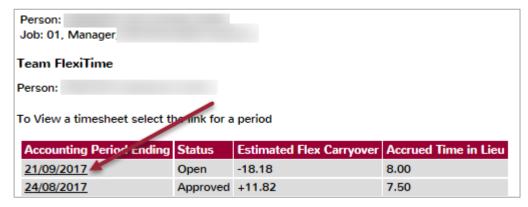
Team Leaders are able to view current and historical flexitime sheets at any time for their current team members (direct reports only).

To view the flexitime sheets of an employee, click on the underlined employee number.

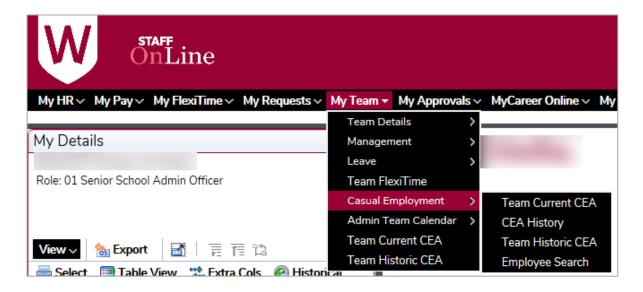
Note – the flex balance that displays here is not their current flex carryover balance. You will need to enter the employees flexitime sheet to view their current carryover.



Team Leaders can then access a detailed view of current and historic flexitime sheets by clicking on the accounting period ending date.



CASUAL EMPLOYMENT

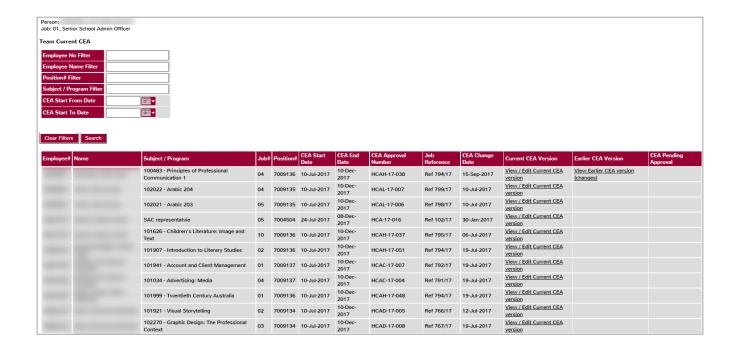


Team Current CEA

The Team Current CEA menu item provides access to your teams current electronic Casual Employment Agreements (CEAs) and any earlier versions of the CEA that have been edited via the electronic process. CEAs created using the paper process will not be available.

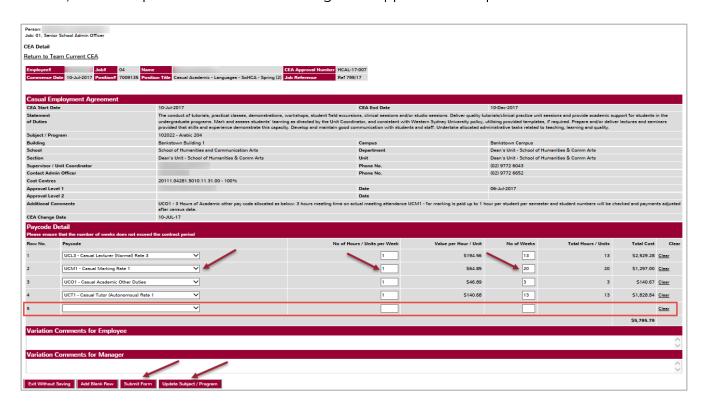
The filter function can assist in narrowing the search of a specific CEA by employee name, position number, subject, start or end date.

Once you have clicked to view the current CEA, you can return to the main list by clicking Return to Team Current CEA.



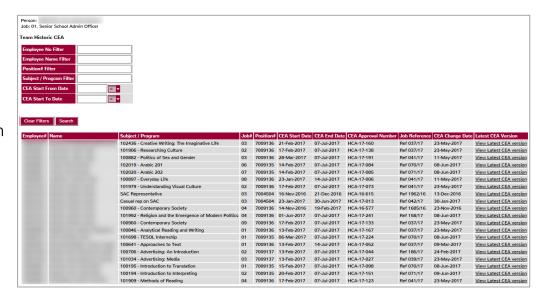
CEA Variation

A request can be made to vary a CEA by clicking on *View/Edit Current CEA Version* and adding details to the blank rows provided or clearing existing rows to amend the CEA. The CEA unit subject/program can also be amended via a CEA variation. Once finished, click the *Submit Form* button, for the request to be sent to the designated approver of the position for review.



Team Historic CEAs

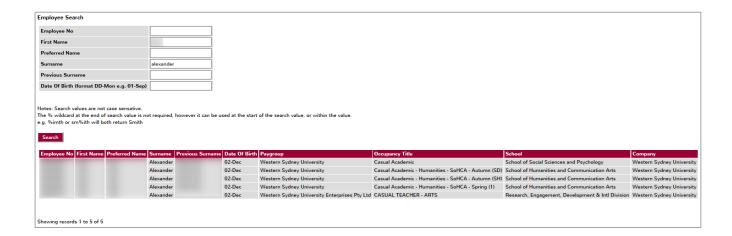
The Team Historic CEA menu item provides access to your teams earlier CEAs. The filter function can assist in narrowing the search of a specific CEA by employee name, position number, subject, start or end date.



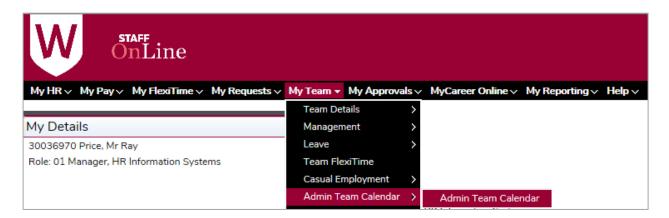
Employee Search



The Employee Search menu item is a useful tool for providing quick access to basic team data. This data may assist to verify the specific employee in the Western Sydney University database by employee number and date of birth in instances where you create or vary a CEA.



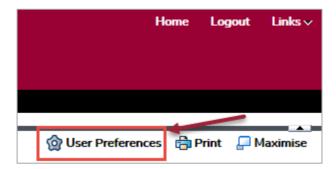
ADMIN TEAM CALENDAR



Team leaders that have admin access are able to separate their team to view their direct reports only in the Team Calendar and admin access team in the Admin Team Calendar.

In addition, team leaders can switch the team displayed in My Team to their direct reports or the admin access team. This is controlled by your User Preferences.

The user preferences are located below within Staff OnLine.



The option to update the team list sits under the 'Team Members' tab within the preferences.



If this setting is set to 'No', the team leader will only view their direct reports within the team list. Setting this to 'Yes' will mean the team leader will view the admin access only.

Note: Users must log out from their Staff OnLine session once these preferences are updated and log back in to ensure the preference is updated.

