



uOttawa

L'Université Canadienne  
Canada's University

## User Guide

# ***FAST Leave Management System***

(for supervisors, approvers and super-approvers - version 1.0)  
Last update: January 30, 2012

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## Need help ?



Do you need help with the Leave Management System ? Contact the Leave Administrator in the Health, Wellness and Leave Sector, by telephone at extension 1473 or by email at [congesrh@uottawa.ca](mailto:congesrh@uottawa.ca).

## Users' responsibilities

All University of Ottawa employees performing administrative duties have the following obligations, namely to:

- 1) respect the confidentiality of the information received in the performance of their duties and avoid using it for personal purposes,
- 2) maintain the confidentiality of their computer passwords and avoid disclosing them to anyone, under any circumstances,
- 3) only access the accounts assigned to them by the University and respect all related restrictions.

## The basics

Here is a list of characteristics that briefly summarizes the Leave Management System.

- 1) Each leave request needs two levels of electronic approvals.
- 2) Certain leave types need a third level of electronic approval.
- 3) The security is determined by the approval role assigned in the Fast Leave Management System.
- 4) There are four different type of approval roles:
  - supervisor

- approver
  - super-approver
  - leave administrator
- 5) An employee having a role of supervisor can only approve leaves at the first level.
  - 6) An employee having a role of approver can approve leave requests at the first and second level and can create supervisor roles.
  - 7) An employee having a super-approver role can approve leave requests at the first and second level. Can create supervisor and approval role, can also fill third-party leave requests and see summaries in their organizational unit.

## Hierarchical Menu

The assigned role in the Leave Management System determines the access to the different tabs within the application.



# Approvers' Menus

Approvers have access to additional tabs that enable them to approve forms and create approver roles.



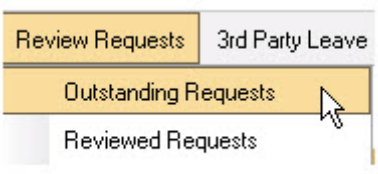
The available tabs for approvers are the following:

- 1) Personal Leave
- 2) Review Requests
- 3) Manage Approvers (approvers and super-approvers only)

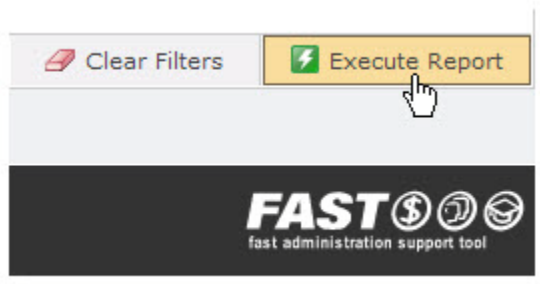
## Approve or reject a leave request

The system shows the leave forms that need approval.

1. Click on Review Request.
2. Click on Outstanding Requests.



3. Click on Execute Report.



4. Click on the leave request to approve.

 <b>Leave Management</b> ▸ <b>Outstanding Requests Summary</b> ▸ Outstanding Requests Summary					
Request ID	Name	Employee ID	Year	Leave Type	First Leave Date
<a href="#">167430</a>	Ross, Karyn	<a href="#">100-11-0000</a>	2011	Sick Leave	2011/02/03
<a href="#">167432</a>	Ross, Karyn	<a href="#">100-11-0000</a>	2011	Sick Leave	2011/04/07
<a href="#">167426</a>	Ross, Karyn	<a href="#">100-11-0000</a>	2011	Annual Leave	2011/06/08
<a href="#">167433</a>	Ross, Karyn	<a href="#">100-11-0000</a>	2011	Leave without Pay	2011/02/23
<a href="#">167434</a>	Ross, Karyn	<a href="#">100-11-0000</a>	2011	Sick Leave	2011/06/15
<a href="#">167427</a>	Ross, Karyn	<a href="#">100-11-0000</a>	2011	Sick Leave	2011/06/13



5. You must validate the leave type and reason and read the comments, date and hours of the leave request.

The screenshot displays the uOttawa Leave Management interface. The top navigation bar includes links for Home, Applications, Personal Leave, Review Requests, Manage Approvers, and Help. The breadcrumb trail indicates the current location: Leave Management > Outstanding Requests Details > Outstanding Requests Details.

**Employee Info**

Leave Request ID:	167430	Employee ID:	50152499
Job:	50152499	Employee Name:	Karyn Ross
Leave Type:	Sick Leave	Adjusted Service Date:	2003/01/06
Leave Reason:	Not Applicable		

**Request Status** IN PROGRESS

**History**

	Name	Date
Sent To:	Beauchamp-Koutras, Louise	2011/02/03
Review 1:		
Sent To:		
Review 2:		
Review 3:		

**Request Comments**

Date	Name	Comment
No records to display.		

**Request Dates**

Day	Date	FD/AM/PM	Calc HRS	Req HRS
THURSDAY	2011/02/03	FD	7	7

6. Click on Approve or Reject.

7. If you are the first approver, you must select the second approver. Add a comment if you must and click on Approve Request.

**Approval Comment:**

The leave request has been approved.

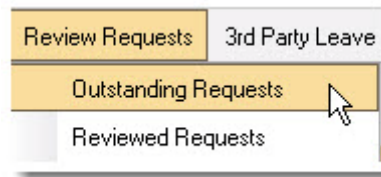
8. The system returns to the list of outstanding requests.

<a href="#">Home</a> <a href="#">Applications</a> <a href="#">Personal Leave</a> <a href="#">Review Requests</a> <a href="#">Manage Approvers</a> <a href="#">Help</a>					
<b>Leave Management</b> ▶ <b>Outstanding Requests Summary</b> ▶ Outstanding Requests					
Request ID	Name	Employee ID	Year	Leave Type	First Le
<a href="#">167429</a>	Ross, Karyn	100102011	2011	Employee's Wedding	201
<a href="#">167428</a>	Ross, Karyn	100102011	2011	Sick Leave	201

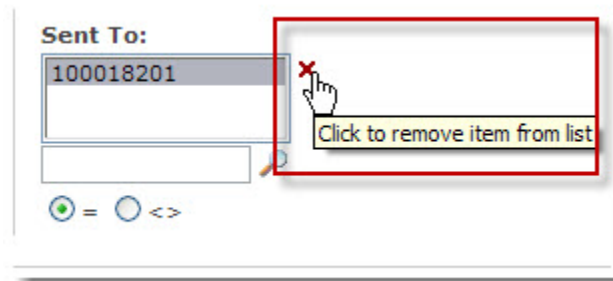
# Approve or reject a leave request for another approver

You can approve or reject leave requests for another approver in your work unit if you have the same security ranges in the System.

1. Click on Review Requests.
2. Select Outstanding Request.



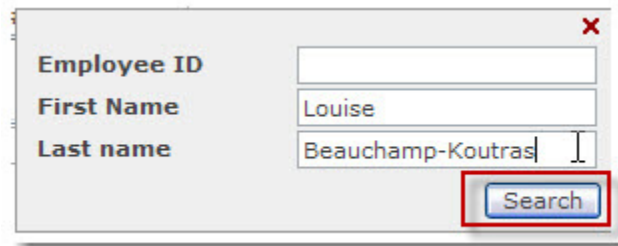
3. Click on the red X in the *Sent To* field to remove your employee number.



4. Click on the magnifying glass of the *Sent To* box to insert the employee number of the approver that you are replacing.



5. Enter the employee number in the *Employee ID* field or enter the name in the first and last name fields of the approver that you are replacing.



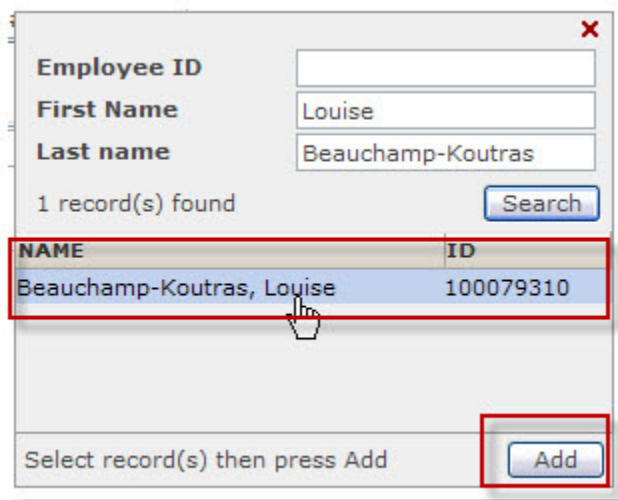
Employee ID

First Name Louise

Last name Beauchamp-Koutras

Search

6. If the approver that you are replacing has outstanding forms, his name will appear and you will simply click on *Add*. However, if the approver does not have any outstanding requests, you will obtain an *No Records Found* message.



Employee ID

First Name Louise

Last name Beauchamp-Koutras

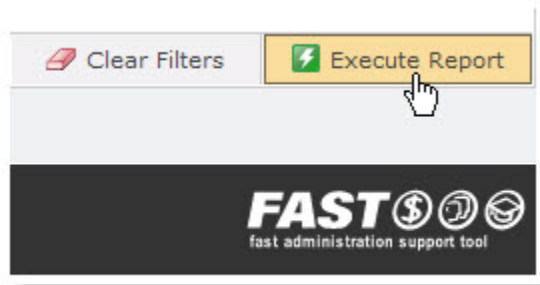
1 record(s) found

NAME	ID
Beauchamp-Koutras, Louise	100079310

Select record(s) then press Add

Add

7. Click on *Execute Report*.



Clear Filters

Execute Report

**FAST** fast administration support tool

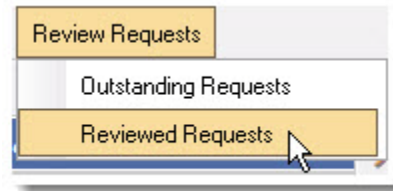
8. Proceed to approve the leave request.

# Searching for a processed leave request form

You can search for a processed leave request form.

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1. Click on Reviewed Request.



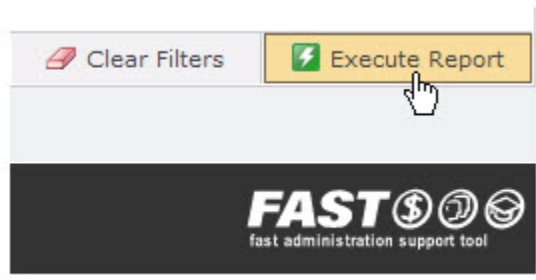
2. Enter the selection parameters in the filter options appearing on the screen. You can use only one filter or a combination of filters. Here is the list of parameters that you can use to find your forms:
  - a) The *Employee ID* enables you to list forms for a specific employee.
  - b) The *Leave Request #* will post the specified leave request form.
  - c) The employee number of the approver (*Approvers* box) enables you to see the list of processed forms by the specified approver.
  - d) The *Year* will post all processed forms within the specified year.
  - e) The *Request Status* will post a list of leave request form based on the specified status.
  - f) The *Leave Type* will post a list of leave requests with the specified leave type(s).

The screenshot displays the filter interface for the FAST application. It consists of six filter boxes arranged in a 2x3 grid. Each box has a title, a search input field, and a set of radio buttons at the bottom. The filters are:
 

- Employee ID**: Search input field with a red 'X' icon and a green '+' icon.
- Leave Request #**: Search input field with a red 'X' icon and a green '+' icon.
- Approvers**: Search input field with a red 'X' icon and a green '+' icon.
- Year**: A list box showing years from 2008 to 2011. The year '2011' is highlighted with a red box.
- Request Status**: A list box showing 'APPROVED', 'IN PROGRESS', and 'REJECTED'. This box is highlighted with a red border.
- Leave Type**: A list box showing 'Annual Leave', 'Sick Leave', 'Family Obligations and Ce', and 'Moving'.

 Each filter box has a set of radio buttons at the bottom: 'All' (unselected), '=' (selected), and '<>' (unselected).

3. Click on Execute Report.



4. The list of leave requests corresponding the parameters entered in the filter options will appear

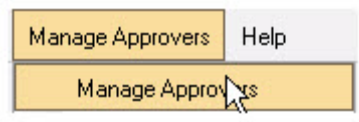
on the screen. To browse the request, click on the Request ID.

Home Applications Personal Leave Review Requests Manage Approvers Help					
Leave Management ▸ Reviewed Requests ▸ Reviewed Requests					
	Request ID	Name	Employee ID	First Leave Date	Last L
1	<a href="#">165983</a>	Ross, Karyn	0000-01-20-00	2011/01/10	2
2	<a href="#">167177</a>	Sigler, Annette	0000-01-20-00	2011/01/24	2

## Create an approver role

Follow the steps to create an approver or supervisor role.

1. Click on Manage Approvers.



- Click on Add Role And ORG.

**Filter Options**

**Employee ID**

**Approver Roles**

Approver  
Supervisor

**Add Role And ORG**

- Click on the magnifying glass to find the employee.

**Add Role and ORG**

Please search for and select an employee to add a Role and ORG to.

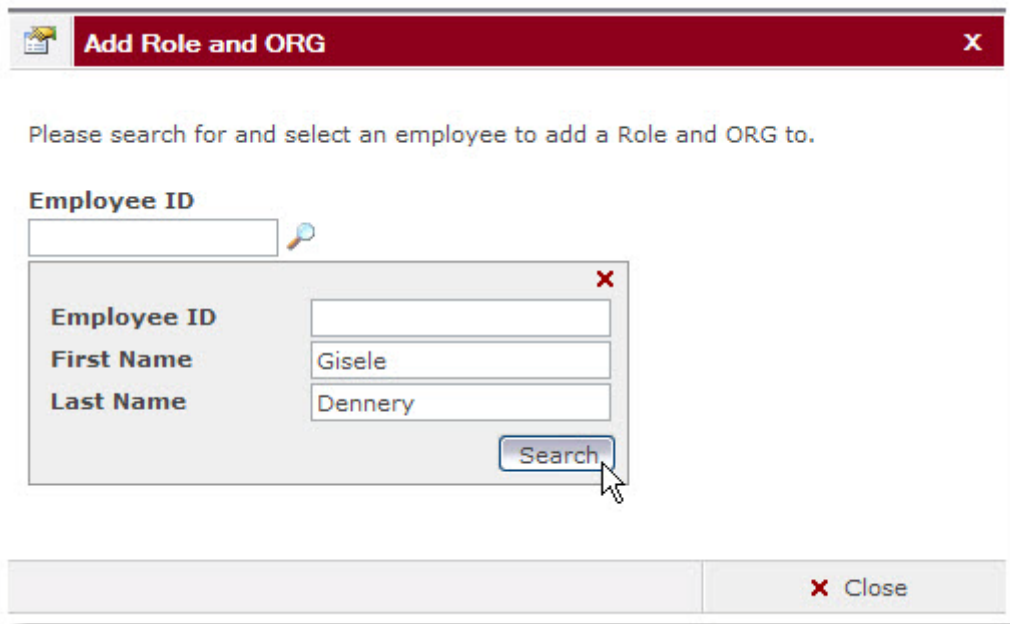
**Employee ID**

Click to search for filter options

Close

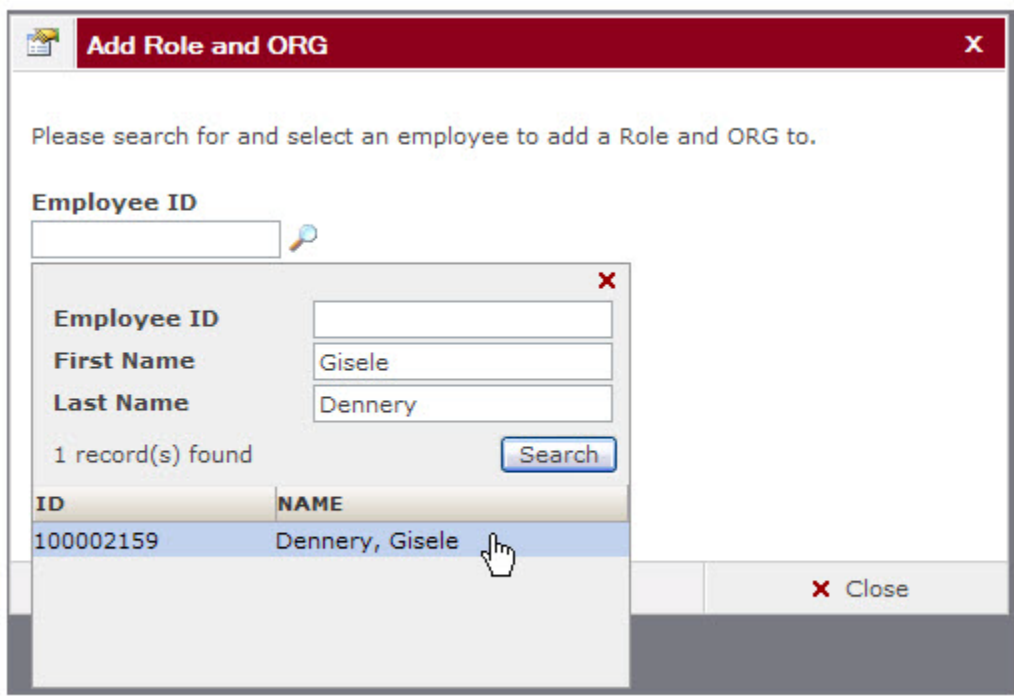


4. Enter the employee number or name in the appropriate fields and click on Search.



The screenshot shows a dialog box titled "Add Role and ORG" with a close button (X) in the top right corner. Below the title bar, there is a text prompt: "Please search for and select an employee to add a Role and ORG to." Underneath this prompt is a search input field labeled "Employee ID" with a magnifying glass icon to its right. Below the input field is a smaller, semi-transparent search results window. This window has a close button (X) in its top right corner and contains three input fields: "Employee ID", "First Name" (containing "Gisele"), and "Last Name" (containing "Dennergy"). A "Search" button is located at the bottom right of this search results window, with a mouse cursor hovering over it. At the bottom right of the main dialog box, there is a "Close" button with a red X icon.

5. Select the employee from the list.



This screenshot shows the same "Add Role and ORG" dialog box, but now the search results window displays a list of results. Above the list, it says "1 record(s) found". The list has two columns: "ID" and "NAME". The first and only entry is "100002159" under the ID column and "Dennergy, Gisele" under the NAME column. A mouse cursor is pointing at this entry. The "Search" button is still visible. The "Close" button is at the bottom right of the main dialog box.

ID	NAME
100002159	Dennergy, Gisele

6. Select the appropriate role (Approver / Supervisor), enter the organization numbers in the Start ORG and End ORG and click on Save. You can assign security roles in the org ranges you have access to.

The screenshot shows a window titled "Add Role and ORG" with a red header bar. The window contains the following fields and controls:

- First Name:** Gisele
- Last Name:** Dennergy
- Employee ID:** 100002159
- Approver Role:** A dropdown menu with "Approver" selected and "Supervisor" as an option.
- Start ORG:** 120101
- End ORG:** 120599
- Save:** A yellow button with a floppy disk icon and the text "Save".
- Close:** A button with a red "X" icon and the text "Close".

7. The system will open a window to confirm that the role has been created, click on Close.

The screenshot shows the same "Add Role and ORG" window, but now it displays a confirmation message and the role details:

**Role and ORG saved successfully for the selected employee.**

<b>First Name:</b>	Gisele
<b>Last Name:</b>	Dennergy
<b>Employee ID:</b>	100002159
<b>Approver Role:</b>	Approver
<b>Start ORG:</b>	120101
<b>End ORG:</b>	120599
<b>Created Date:</b>	05/07/2011 10:12:26 AM
<b>Created By:</b>	Mark Mongeau

**Close:** A yellow button with a red "X" icon and the text "Close".

# View the list of approvers

You can view the list of approvers within you organizational unit.

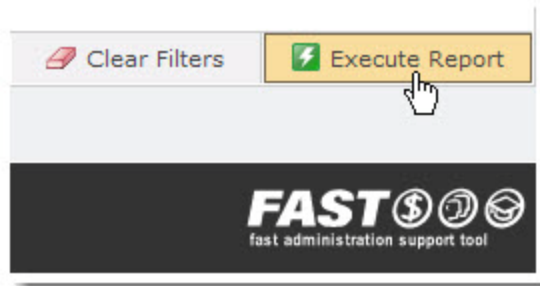
1. Click on Manage Approvers.



2. Select a role and/or enter the Start and End ORGS. You must enter at least one filter to execute the report.

A screenshot of a 'Filter Options' dialog box. The dialog has a red header bar with a magnifying glass icon and the text 'Filter Options'. Below the header, there are four main sections: 'Employee ID', 'Approver Roles', 'Start ORG', and 'End ORG'. The 'Employee ID' section has a text input field with a red 'X' icon to its right and a search icon to its left. Below the input field are two radio buttons: one with a green dot and one with a blue dot, followed by an equals sign and a double arrow icon. The 'Approver Roles' section has a list box containing 'Approver' and 'Supervisor', with a search icon to its right. Below the list box are three radio buttons: 'All', one with a green dot, and one with a blue dot, followed by an equals sign and a double arrow icon. The 'Start ORG' section has a text input field containing '120101' and a search icon to its right. The 'End ORG' section has a text input field containing '120599'.

- Click Execute Report.



- The list of approvers/supervisors appears on the screen.

<a href="#">Leave Management</a> ▶ <a href="#">Manage Approvers</a> ▶ <a href="#">View/Edit Users, Roles, and Organizations</a>				
Employee	Name	Approver Role	Start ORG	End ORG
<a href="#">100121901</a>	Akyna, Margaret	Supervisor	121901	121999
<a href="#">100120401</a>	Alshehri, Lindsay	Supervisor	120401	120499
<a href="#">100120101</a>	Alvarez, Ibrahim	Supervisor	120101	120101
<a href="#">100120701</a>	Ataya, Robert	Supervisor	120701	120799
<a href="#">100121299</a>	Balina, Amaryllis	Supervisor	121299	121299
<a href="#">100120601</a>	Beauchamp, Catherine	Supervisor	120601	120601
<a href="#">100120901</a>	Beauchamp, Claudette	Supervisor	120901	120999
<a href="#">100120201</a>	Beauchamp-Koutras, Louise	Approver	120201	120299
<a href="#">100120701</a>	Black, Louis	Supervisor	120701	120799
<a href="#">100120101</a>	Blair, Domingos	Approver	120101	120199
<a href="#">100121601</a>	Boudreault, Marie	Supervisor	121601	121699
<a href="#">100121001</a>	Cecyre, Blair	Supervisor	121001	121001
<a href="#">100120601</a>	Charbonneau, Letitia	Supervisor	120601	120699
<a href="#">100121401</a>	Cormier, Asyera	Supervisor	121401	121401
<a href="#">100121611</a>	Denard-Robelin, Sandra	Supervisor	121611	121611

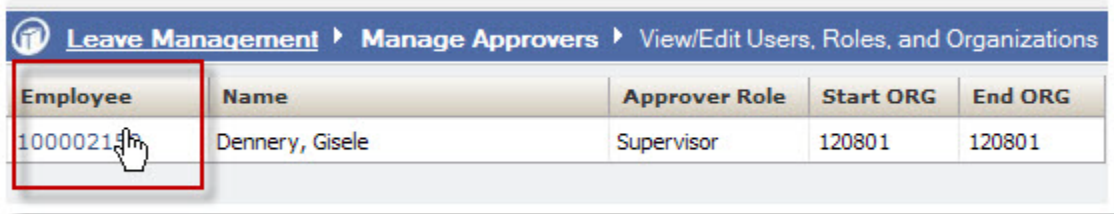
## Deactivate an approver role

Follow the next steps to deactivate an approver or supervisor role. You cannot deactivate a role if there are any outstanding leave requests that need to be approved by the approver or supervisor.

1. Click on Manage Approvers.

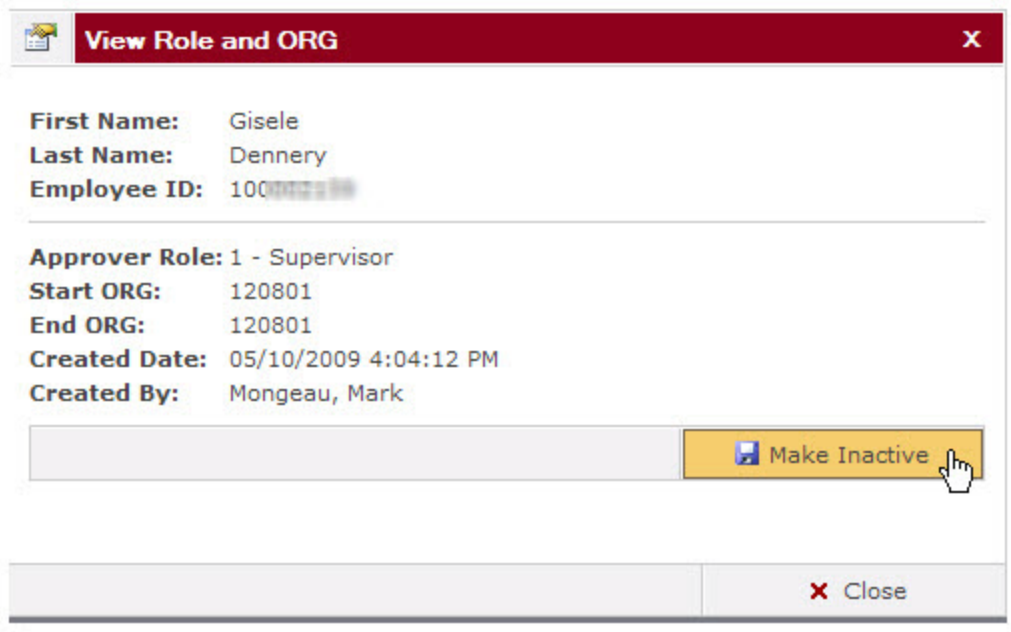


2. Follow the steps of the previous section View the list of approvers.
3. Click on the approver's employee number.

A screenshot of a web application interface. At the top is a blue navigation bar with the text 'Leave Management > Manage Approvers > View/Edit Users, Roles, and Organizations'. Below this is a table with five columns: 'Employee', 'Name', 'Approver Role', 'Start ORG', and 'End ORG'. The first row of the table is highlighted with a red border and a mouse cursor pointing at the 'Employee' cell, which contains the value '10000215'.

Employee	Name	Approver Role	Start ORG	End ORG
10000215	Dennergy, Gisele	Supervisor	120801	120801

4. Click on Make Inactive.



The screenshot shows a window titled "View Role and ORG" with a red header bar. The window contains the following information:

<b>First Name:</b>	Gisele
<b>Last Name:</b>	Dennerly
<b>Employee ID:</b>	100002159

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<b>Approver Role:</b>	1 - Supervisor
<b>Start ORG:</b>	120801
<b>End ORG:</b>	120801
<b>Created Date:</b>	05/10/2009 4:04:12 PM
<b>Created By:</b>	Mongeau, Mark

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At the bottom right, there is a yellow button labeled "Make Inactive" with a mouse cursor pointing at it. At the bottom center, there is a "Close" button with a red 'X' icon.

5. The system will confirm that the account has been deactivated, click on Close.



The screenshot shows the same "View Role and ORG" window, but now it displays a confirmation message:

You have successfully made this record inactive.

The "Make Inactive" button is no longer visible. The "Close" button at the bottom right now has a mouse cursor pointing at it.

# Menus for the super-approvers

The super-approvers have access to an additional tab (3rd Party Leave) that enables them to create leave request forms for other employees in their organizational unit.



The creation of a leave request form for another employee works the same way as when the employee himself creates the leave request form. For information on how to create a Leave Request refer to the *Fast Leave Management System User Guide*.

**A super-approver that has created a leave request form as a third party cannot approve the request. It is recommended that the following sentence be added in the *Comment* box of the Leave Form to ensure that the request is not returned to the super-approver for his or her approval.**

**“Please send this leave request to the following approver, xxxxxx”. “I cannot approve this form as I have created it for the employee”.**