Admin Guide: ASCENDER EmployeePortal Leave Requests Setup

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Admin Guide: Leave Requests Setup

This guide provides the necessary steps to set up Security Administration and Payroll in order to take complete advantage of the benefits associated with using the leave request feature in EmployeePortal.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

Set up Supervisor and Temporary Approver Profiles

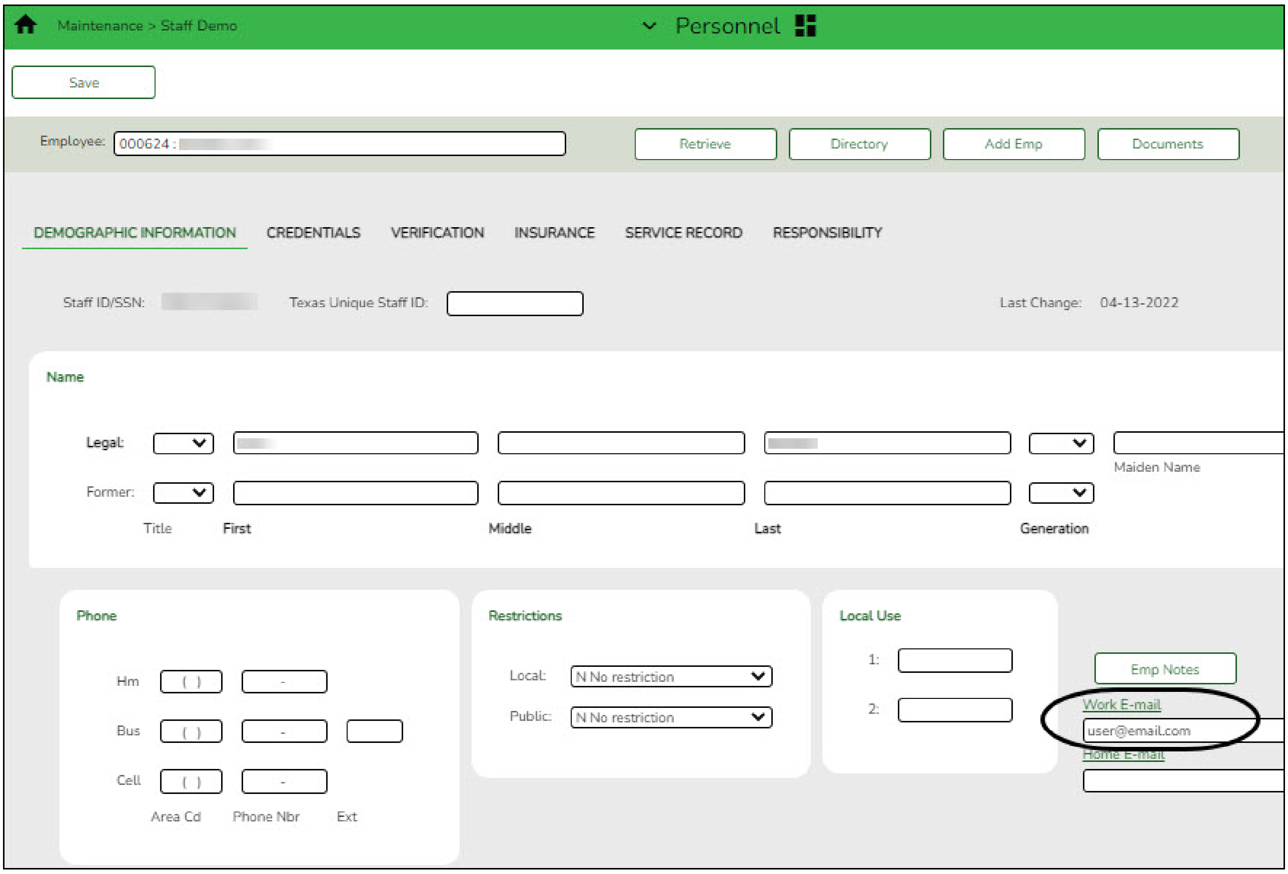
Before an employee can be set up as a supervisor, approver, or temporary approver, the employee must have a security user profile.

1. Create a demographic record.

   Personnel > Maintenance > Staff Demo > Demographic Information

   ❑ Create an employee record. The record cannot be a non-employee record created in District Administration.

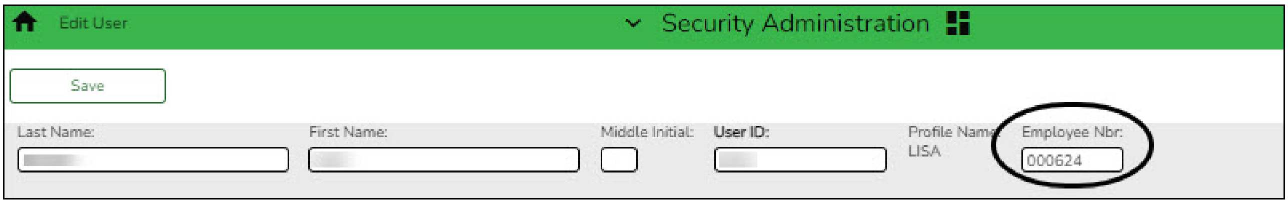
   ❑ Add an email address to the employee record to allow the supervisor or temporary approver to receive automatic reply and workflow emails.



2. Create a security profile.

Security Administration > Manage Users

❑ Update the user's profile with the employee number that was generated on the employee's Personnel demographic record.



❑ If the employee has an existing user profile, ensure that the profile is active (i.e., not marked as deleted in Security Administration).

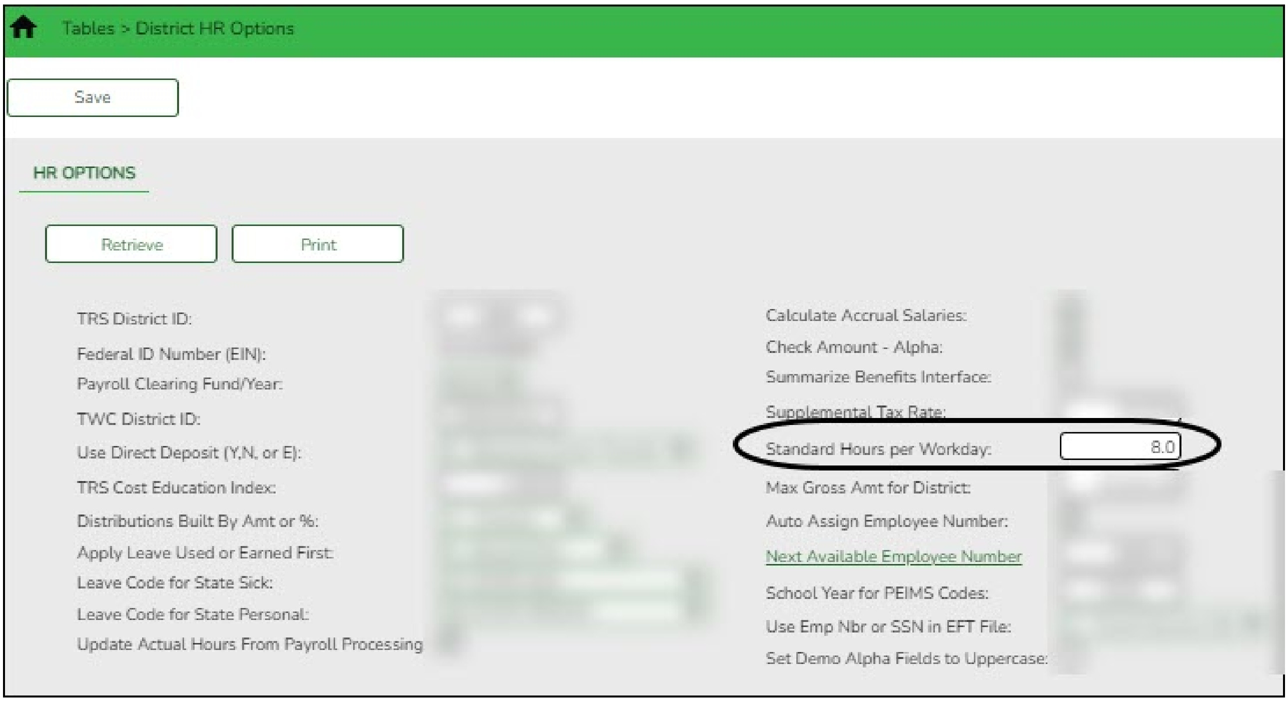
Set up Payroll Options

If you have not already, perform the following tasks to ensure that the leave request feature in EmployeePortal is properly set up and functions as intended for employee and supervisor users.

1. Set the standard work day.

   Payroll > Tables > District HR Options

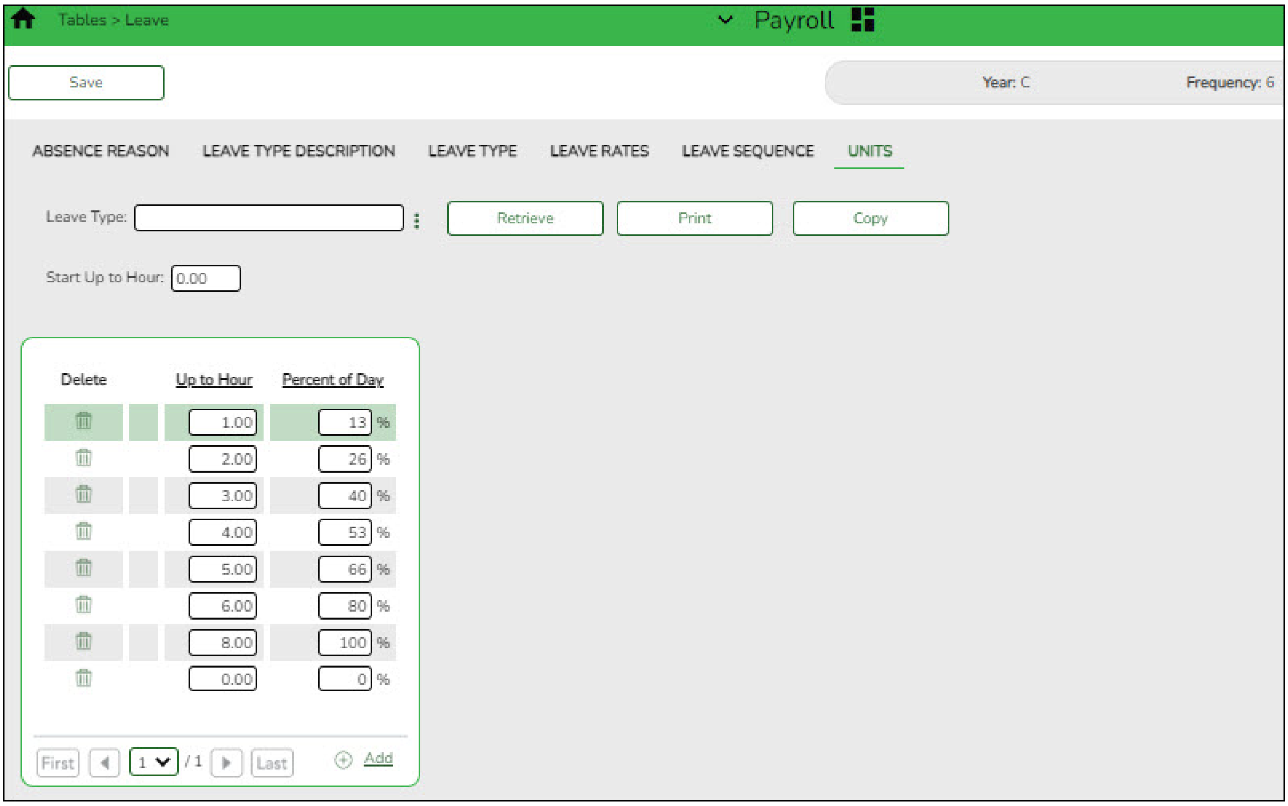
   In the **Standard Hours per Workday** field, type the standard number of hours that the LEA requires hourly employees to work.



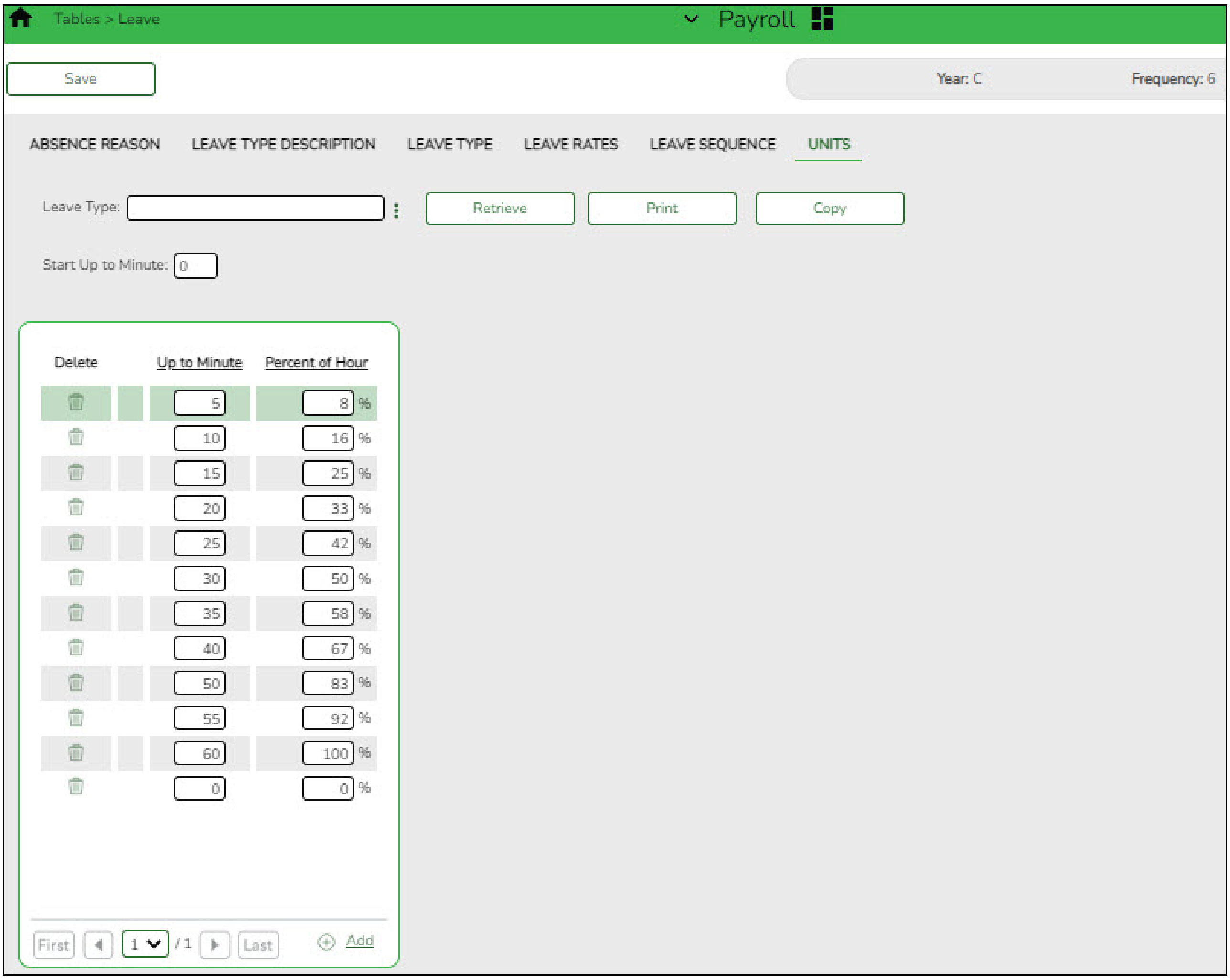
2. Define the units of hours or days to be used when calculating leave requests.

   Payroll > Tables > Leave > Units

   ❑ If the **Days/Hrs** field is set to *Days* on the Tables > Leave > Leave Type tab for the selected leave type, add units for hours.



❑ If the **Days/Hrs** field is set to *Hours* for the selected leave type, add units for minutes.

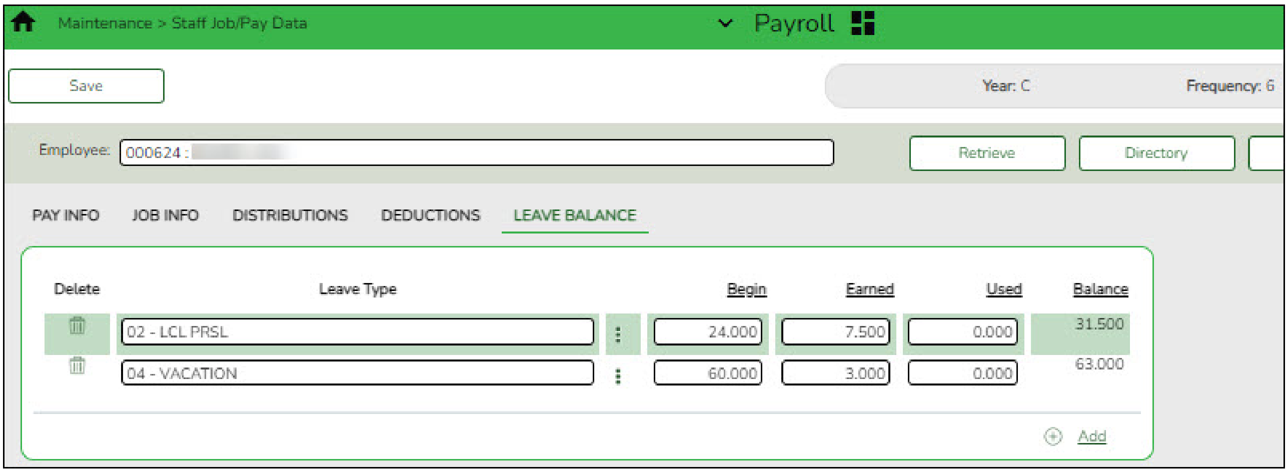


3. Assign leave types and balances for each applicable pay frequency.

   Payroll > Maintenance > Staff Job/Pay Data > Leave Balance

   You can assign multiple leave types to employees in the pay frequency to which you are logged on.

   Note: If the employee has leave balance data in multiple frequencies, the employee can select the pay frequency from the **Pay Frequency** drop down on the Leave Requests page in EmployeePortal.

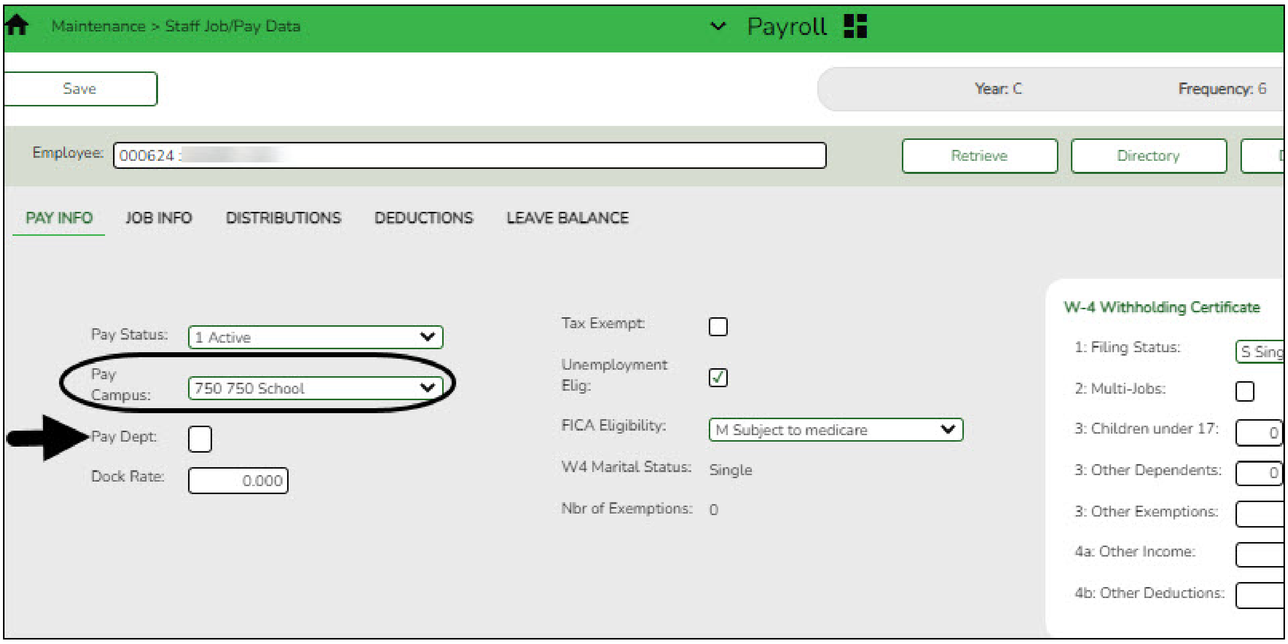


4. Manage leave pay campuses.

   The employee's pay campus must exist on the Payroll > Tables > District EP Options > Leave Campuses tab to allow the employee to access the Leave Requests page in EmployeePortal.

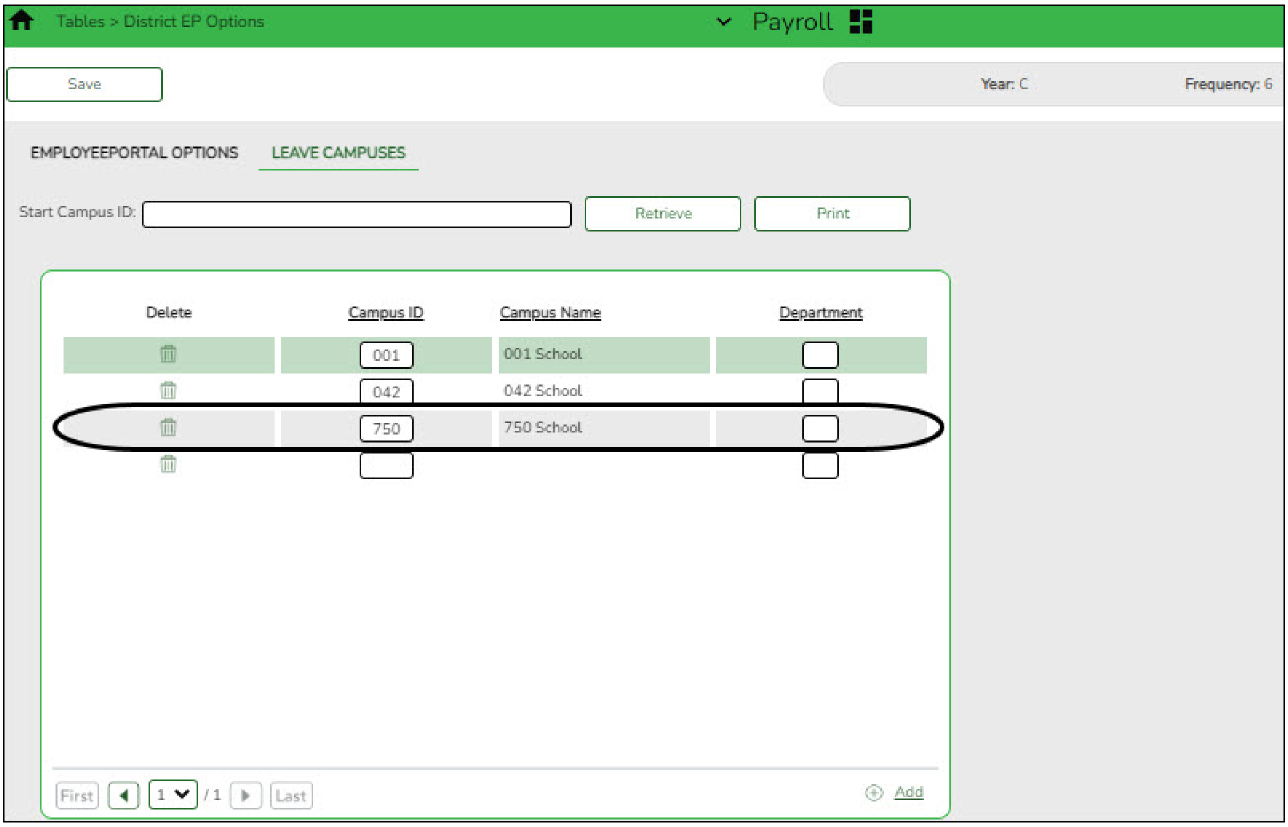
   ❑ Payroll > Maintenance > Staff Job/Pay Data > Pay Info

   - Obtain the employee pay campus data.
   - *Optional*: Obtain the **Pay Dept** if applicable.



❑ Payroll > Tables > District EP Options > Leave Campuses

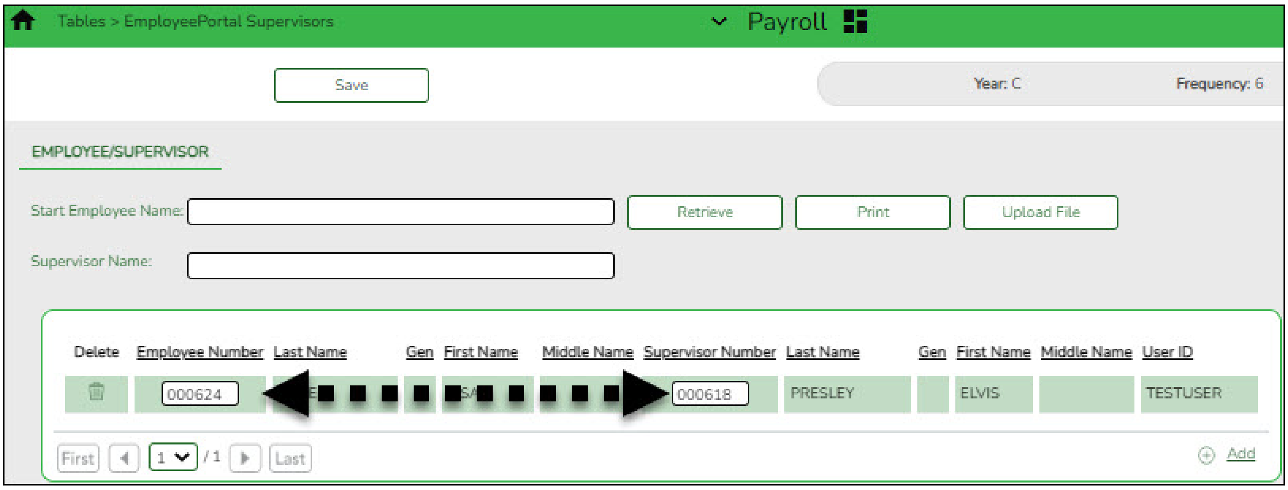
- Each pay campus and department with assigned employees must be added to this tab in order to use the EmployeePortal leave request feature.
- *Optional*: If a **Pay Dept** is assigned to the employee on the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab, then it must be assigned on the Leave Campuses tab.



5. Designate the employee/direct supervisor relationship.

This setting serves two purposes, it determines the leave request approval path for the employee and allows the supervisor to access the Supervisor menu in EmployeePortal.

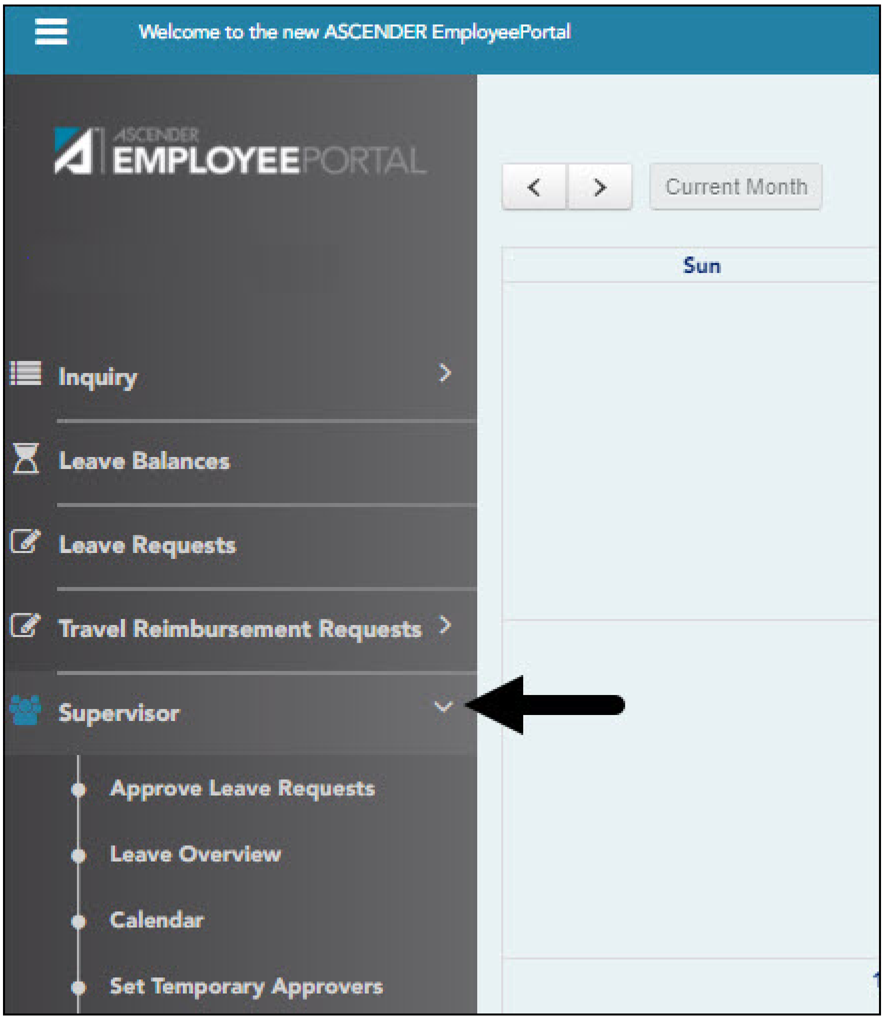
Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor



Notes:

- This page does not need to be populated if **Use PMIS for Supervisor Levels** is selected on the Payroll > Tables > District EP Options > EmployeePortal Options tab.
- An employee must have a designated supervisor prior to submitting leave requests in EmployeePortal.

A supervisor must have at least one assigned employee on the Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor tab in order to access the Supervisor menu in EmployeePortal.

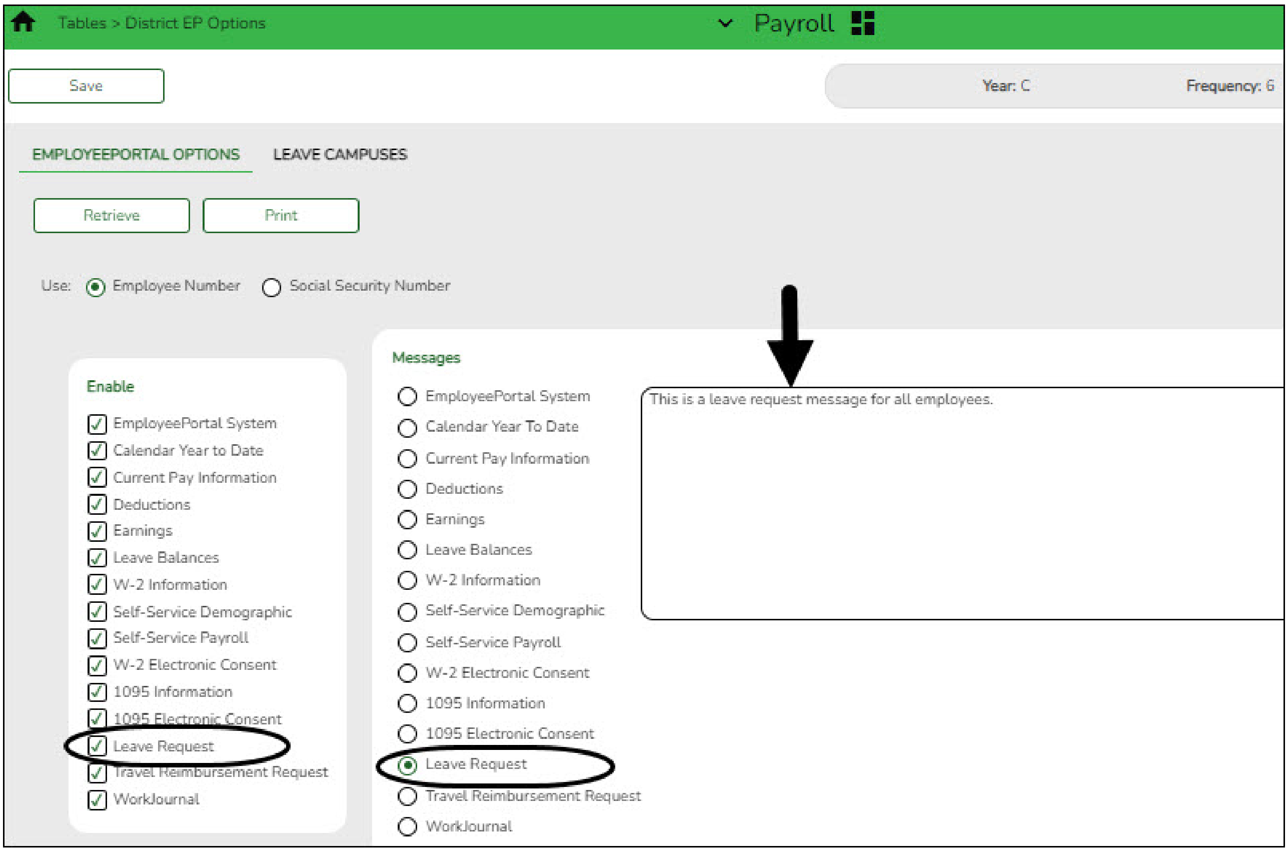


Refer to the Supervisor Guide: Manage Leave Data and Requests & Set Temporary Approvers for more information about setting up temporary approvers and performing supervisor-level tasks.

Enable the Leave Request Feature

1. Set up district EP options.

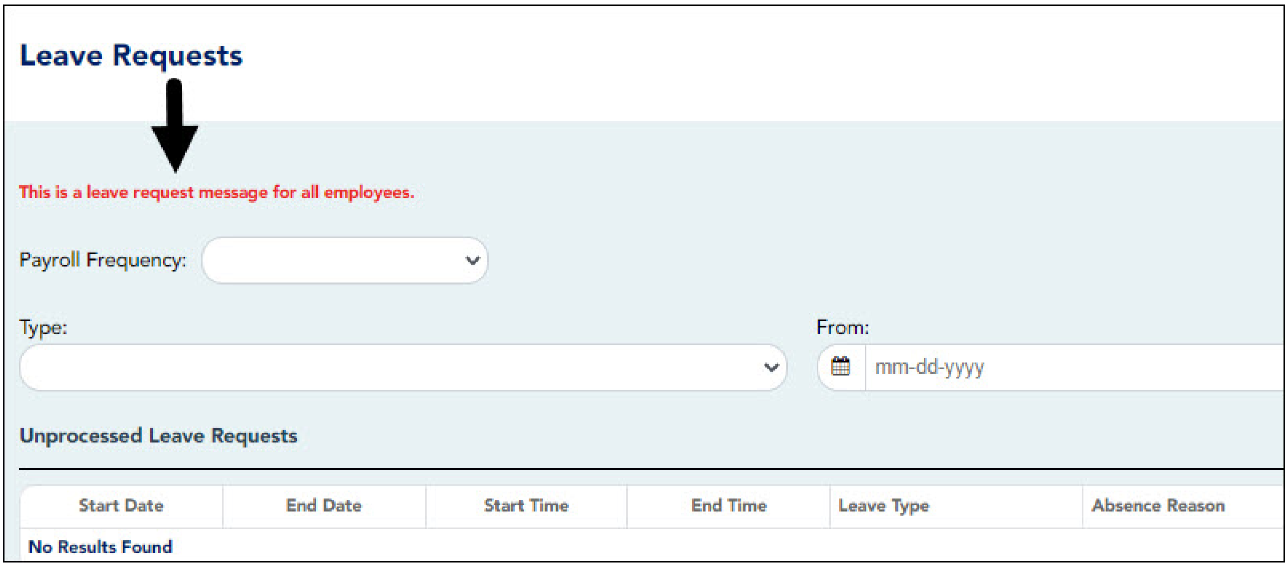
   Payroll > Tables > District EP Options > EmployeePortal Options



❑ Under **Enable**, select **Leave Request** to enable the leave request feature in EmployeePortal.

❑ Under **Messages**, select **Leave Request** to enable employees to view a preset message on the Leave Requests page in EmployeePortal.

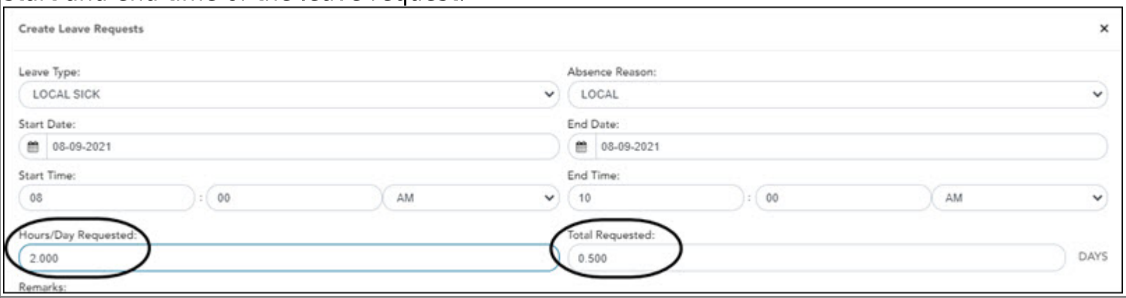
- Type the applicable message in the text box.
- The message is displayed in red at the top of the Leave Requests page in EmployeePortal.



Use PMIS for Supervisor Levels	(Optional if using PMIS) Select to reference the Position Management Information System (PMIS) to determine an employee's supervisor. This option obtains the supervisor's employee number from the employee's primary position to determine the appropriate approval path for the employee's leave request. If this field is selected, you do not need to complete the Payroll > Tables > EmployeePortal Supervisors > Employee/Supervisor page.

<table>
<tr>
<td>Force Entry of Leave Hours Requested</td>
<td>Select to require the employee to enter the number of requested leave hours when submitting a leave request.

If selected, the number of leave hours requested is not automatically calculated.


If not selected, the number of leave hours requested is automatically calculated based on the start and end time of the leave request.


</td>
</tr>
<tr>
<td>Meal Break for Leave Calculation</td>
<td>Type the number of hours to be included in the hours per day calculation if a leave request exceeds five hours. An amount must be entered if a meal break is to be subtracted in the hours per day calculation. Valid values are 0.00-9.99.</td>
</tr>
</table>

❏ Click **Save**.

Review the Leave Requests Help page for further information about how the **Total Requested** column is calculated.

After the above steps are completed, employees can submit leave requests in EmployeePortal.

Ensure that all employees are set up with a user name and password, and can log on to EmployeePortal. If not, review the Employee Guide: Create Account & Login for additional information about user setup.