– SUPERVISOR USER GUIDE –
LEAVE MANAGEMENT SYSTEM (LMS)

If you are a supervisor and/or are responsible for approving leave requests submitted by people in your department, you will have been provided with "Administration" features in the Leave Management System.

Administration features allow you to submit, modify, withdraw, accept/ reject employee leave requests, as well as view the leave history for people who report to you.

In addition, when your employees submit/modify/withdraw a leave request, or modify their working hours, you receive an email message notifying you of the transaction.

Since the Leave Management system is in real-time, if you do not approve/disapprove a request and the day of the request has come and gone, the request is automatically approved and will no longer be listed on Pending requests. The request will be listed on View History.

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To Access Leave Management

1. Open Internet Explorer and go to the County Intranet (cww).
2. Type (or copy/paste) the following in the Address field, and click Go.
   http://sql082:8888/lm

Put Shortcut on desktop

As soon as the Login screen is displayed (before you sign-on to the system), right-click a blank area of the login screen, and click **Create Shortcut**.

You can also add Leave Management to your Favorites – display the Login screen, click the **Favorites** menu, and select **Add to Favorites**.

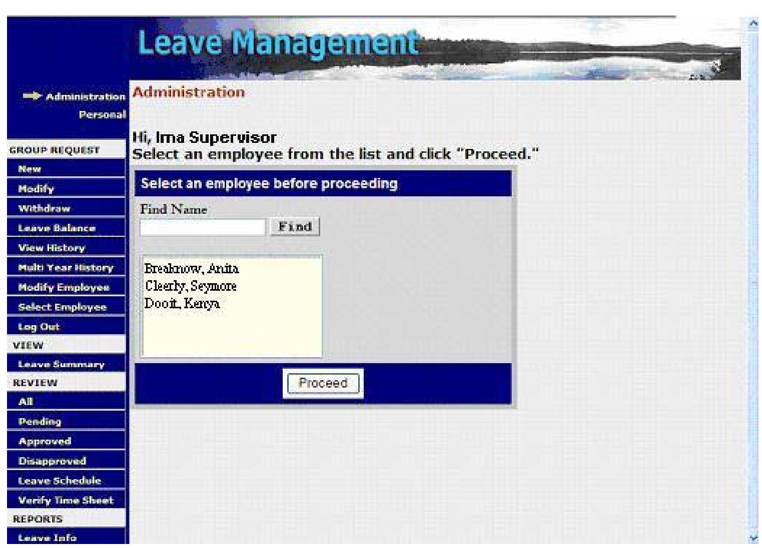
Forgot Your Password?

1. When the Login screen is displayed, click **Forgot your password**?
2. Type your County Userid in the **Enter your Outlook ID** field.
3. Type the **last four (4) digits of your Social Security numbe**r where indicated.
4. Click **Submit**. Your Leave Management password will be e-mailed to you.

Login

1. Enter your County Userid in the Userid field.
2. Enter your Time and Leave password in the password field.
   Note: If you have problems with your password, call the Help Desk (995-5513).
3. Click the Sign On button.

After you have logged on, the Welcome screen appears showing your personal Current Leave Balances for the year. To access leave information for one of your employees, click **Administration** (top of Menu Bar).



Before you can access specific employee information, you must **select an employee**, then click Proceed.

Once an employee has been selected, you can use the links on the vertical Menu Bar (located on left side of screen) to perform any of the following actions:

<u>**New**</u> – submit a new leave request for an employee

1. Select desired employee, and then click **New** on the Menu Bar.
2. Enter the start/end dates either by typing the dates, or click the mini-calendar button and then click on the appropriate dates.
3. Enter the start/end times where indicated.
4. In **Leave Type**, click the drop-down arrow and select the type leave being requested (i.e. annual, personal).
5. In **Total Hours,** type the total number of hours being requested. Half hours should be entered as .30
6. Click **Submit**.
7. On the **Confirm Leave Request** screen, click **Submit** to confirm the request … or …
   <u>To remove a request</u> - click the check box to the left of the request, then click **Remove.**
   <u>If you do not want to submit any requests</u> - click **Cancel**.
8. After you click **Submit**, a **Confirmation** screen appears showing the pending leave request(s).

<u>**Modify**</u> – modify a submitted request

1. Select desired employee, and then click **Modify** on the Menu Bar.
2. Click the radio button to the left of the request you want to modify.
3. Click **Modify Selected Request**.
4. When the **Modify Request** screen appears, change the appropriate fields (i.e. date, time, total hours) and click **Submit**.
5. When the **Confirmation** screen appears, click **Submit** … or …
   <u>To remove a request</u> - click the check box to the left of the request, then click **Remove.**
   <u>If you do not want to submit any requests</u> - click **Cancel**.
6. After you have clicked **Submit**, a **Confirmation** screen appears indicating that the request has been modified.

<u>**Withdraw**</u> – withdraw a leave request

1. Select desired employee, and then click **Withdraw** on the Menu Bar.
2. Select the request you want to withdraw.
3. Click **Withdraw Selected Request(s)**.
4. Click **OK** when asked "Are you sure?"

<u>**Leave Balance**</u> – view a selected employee's current leave balances

<u>**View History**</u> – view a selected employee's leave history for present/previous year

<u>**Multi Year History**</u> – view a selected employee's multi-year leave history

Modify Employee – change an employee's hours and/or supervisor's name

After selecting the desired employee, the following information can be modified:

Supervisor - to change the name of an employee's immediate supervisor, click the drop down arrow and then select the desired name from the list.

Conflict Code – if certain staff members cannot be out of the office at the same time, you can assign these individuals the same 'conflict code' so that when approving leave requests you are notified if there will be a conflict.

Lunch Minutes – 30 or 60 minutes can be selected as lunch minutes.

Start Time/End Time – use the drop-down arrows to select the employee's Start/End times.

Total Hours – enter total hours worked (remember -subtract lunch minutes when computing total hours).

Effective Date - enter the date these changes are to take effect by clicking the mini-calendar button, or by typing the date.

Expiration Date- if these changes are only temporary, enter the date they will expire.

1. Once all desired changes have been made, click **Save**.
2. When the Updated Information screen is displayed, you can click:
   Print - to print a copy of this information, or
   Email Me - to send the information to Outlook.
3. Click **Done** and you are returned to the **Select Employee** screen.

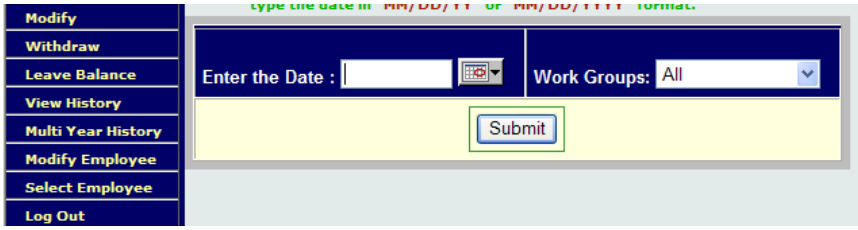
Select Employee – display the list of employees who report to you

Log Out

Note: after 30 minutes of inactivity, the system automatically logs you off.

Leave Summary – summary of leave balances for a work group

1. Enter the desired date by clicking the mini-calendar button, or by typing the date.
2. Click the drop-down arrow of the **Work Groups** field, and select the group you wish to view.



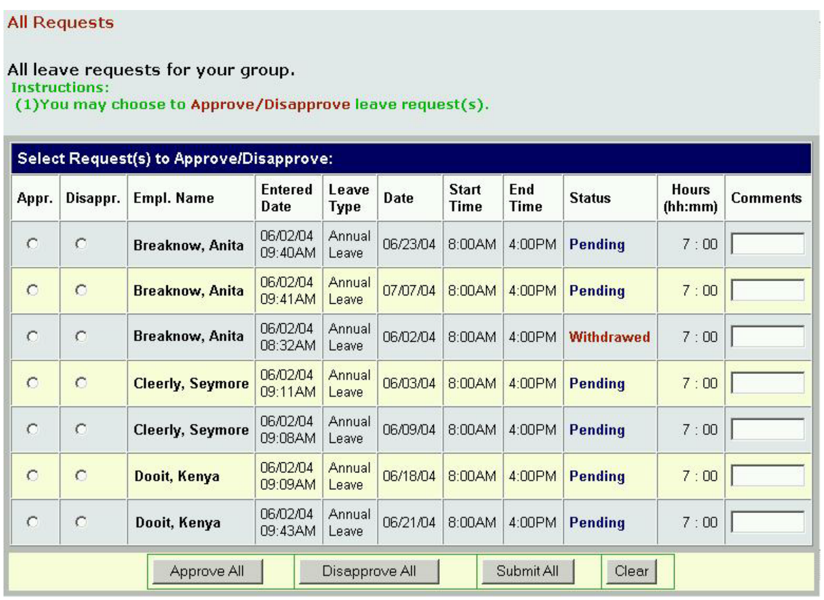
3. Click **Submit** to display the leave summary for the selected group.
4. Click **Print History** - to print the summary…or…
   Click **Email Me -** to have the summary automatically sent to your Outlook mailbox.

REVIEW SECTION

All – view the status of all employees' submitted requests

This screen displays current requests submitted by all your employees and indicates whether they were Approved/Disapproved or are still Pending. You can Approve/Disapprove requests using this screen.

Note: When a request is submitted, the supervisor receives an email message which includes the name of the employee who submitted the request and a link to the Leave Management login screen. After logging on, you are automatically brought to the Pending requests screen for **THAT** employee. If other employees have also submitted requests that you wish to approve/disapprove, click **All** or **Pending** on the Menu Bar to view all employees' leave requests.


All Requests

All leave requests for your group.
Instructions:
(1)You may choose to Approve/Disapprove leave request(s).

Select Request(s) to Approve/Disapprove:

Appr.	Disappr.	Empl. Name	Entered Date	Leave Type	Date	Start Time	End Time	Status	Hours (hh:mm)	Comments
		Breaknow, Anita	06/02/04 09:40AM	Annual Leave	06/23/04	8:00AM	4:00PM	Pending	7 : 00	
		Breaknow, Anita	06/02/04 09:41AM	Annual Leave	07/07/04	8:00AM	4:00PM	Pending	7 : 00	
		Breaknow, Anita	06/02/04 08:32AM	Annual Leave	06/02/04	8:00AM	4:00PM	Withdrawed	7 : 00	
		Cleerly, Seymore	06/02/04 09:11AM	Annual Leave	06/03/04	8:00AM	4:00PM	Pending	7 : 00	
		Cleerly, Seymore	06/02/04 09:08AM	Annual Leave	06/09/04	8:00AM	4:00PM	Pending	7 : 00	
		Dooit, Kenya	06/02/04 09:09AM	Annual Leave	06/18/04	8:00AM	4:00PM	Pending	7 : 00	
		Dooit, Kenya	06/02/04 09:43AM	Annual Leave	06/21/04	8:00AM	4:00PM	Pending	7 : 00	

Approve All | Disapprove All | Submit All | Clear

To Approve/Disapprove Requests:

Approve **all** requests - click **Approve All**, and then click **Submit**.
Disapprove **all** requests – click **Disapprove All**, and then click **Submit**.
Approve/Disapprove **some** requests - click the radio button in **Appr.** or Disappr. column for the desired request, and then click **Submit**.

Pending – view requests waiting for approval/disapproval

All employees' leave requests that have been submitted and that you have not yet approved/disapproved are listed on the Pending screen.

However, since the Leave Management system is in 'real-time,' if you did not approve/disapprove a request and the day of that request has come and gone, that request will have been automatically approved and will no longer be listed under Pending requests.

To see requests that were "**Auto Approved**," select the desired employee and go to **View Histor**y.

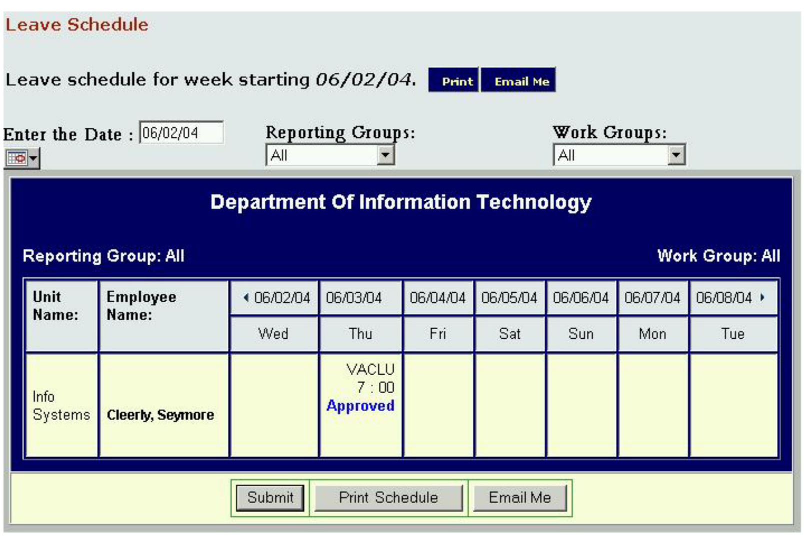
Approved – view approved leave requests

Leave requests that have been approved are displayed. If you have already approved a leave request but now must disapprove it, click the check box next to the desired request, and then click Submit.

Disapproved – view disapproved requests

Leave requests that have been disapproved are displayed. If you have already disapproved a leave request but now wish to approve it, click the check box next to the desired request, and then click Submit.

Leave Schedule – view leave schedule for a specified week



1. Click the mini-calendar button and then click the starting date for the week you wish to view.
2. Click the drop-down arrow of **Reporting Group** and **Work Group** to select the desired groups.
3. Click **Submit** to display the leave schedule.
4. Click **Print Schedule** - to print the leave schedule…or…
   Click **Email Me** - to have the leave schedule automatically sent to your Outlook mailbox.

Verify Time Sheet – view requests that have already been processed

1. Enter the start/end dates either by typing the dates, or click the mini-calendar button, and then click the desired dates.
2. Click **Submit** to display the Time Sheet.
3. You can then **Print** the Time Sheet, **Email** yourself a copy, or **Export** it to Excel.

REPORTS SECTION - under construction

Leave Info