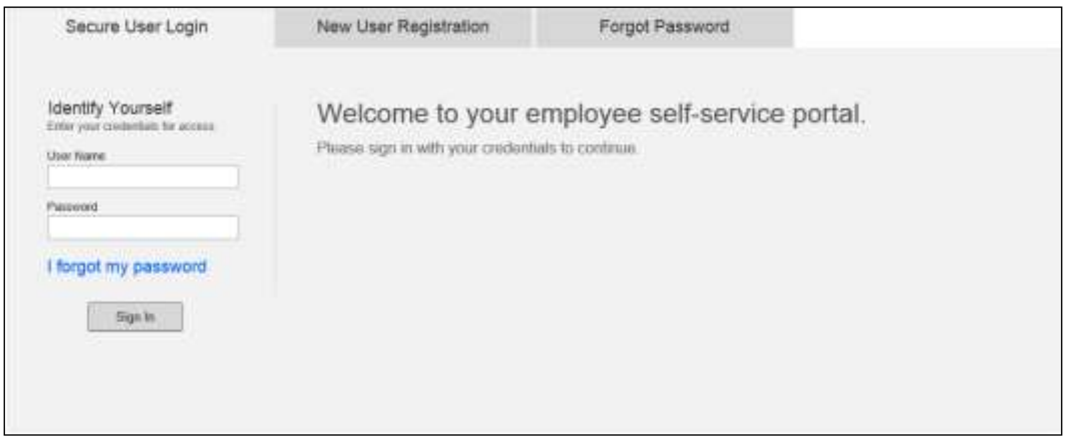
Employee Portal - User Guide for Managers

This User Guide is designed as a tool for managers responsible for approving employee changes and time off requests in the Employee Portal.
The Employee Portal can be used on tablets and mobile devices.

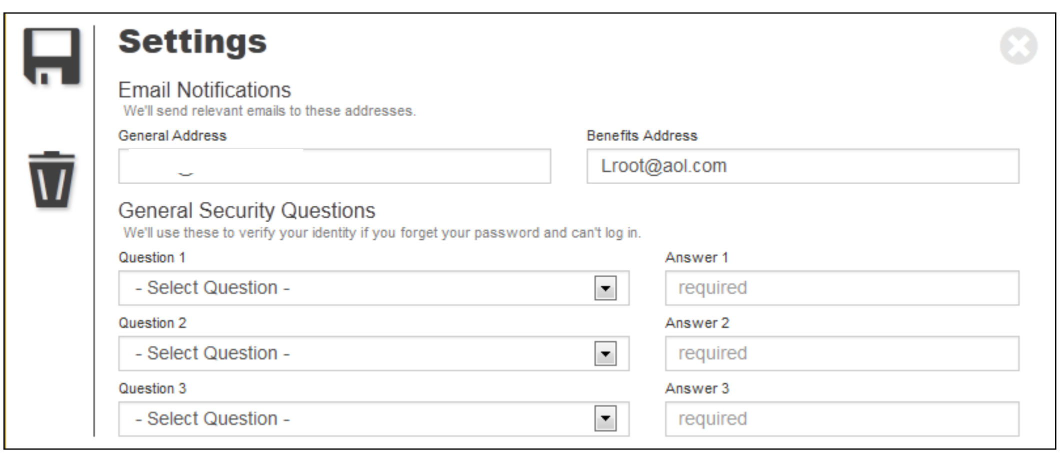
Initial Login to the Employee Portal

1. Open a Web browser and enter the URL provided by iSystems for access to the Employee Portal.
   Result: The Login screen opens to the Secure User Login tab.



2. Enter the Username and Password assigned by the Administrator.
3. Click **Sign In.**

Result: The Settings screen opens, on which are Security Questions the user must set up for future login.



4. Select three General Security Questions from the dropdown lists and enter the answers on the right.
5. Select two Extra Security Questions from the dropdown lists and enter the answers on the right.
6. Click the **Save** button.
   Result: the Employee Portal Dashboard opens.

Note: The next time the user logs in, two of the pre-selected security questions will be displayed, that the user will need to answer.

Dashboard

The Dashboard is divided into five tiles plus the Header, on which are located the Company's logo, employee's name, and the Navigation buttons. All of the information that the manager sees on the Dashboard is his/her own – not those of the employees.

Employee Identification

The manager's first and last name displays in the Header when logged into the portal.

Navigation Buttons

There are several buttons in the upper right corner of the Dashboard used to navigate the application.

Note: There are ellipses buttons next to every tile name on the Dashboard screen. Clicking the ellipses brings the user to the same place(s) in the application as the Navigation Buttons.

Home Button

1. Click the **Home** button from anywhere in the application to be brought back to the Dashboard.

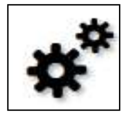
Menu Button

2. Click the **Menu** button to access additional menu buttons to the screens on which information is displayed on the Dashboard. The buttons on the right are those used by employees; the ones on the left are used by managers, and are not visible to users who are not managers.

   For more information about the buttons on the right used by employees, refer to the *Employee Portal User Guide for Employees.*

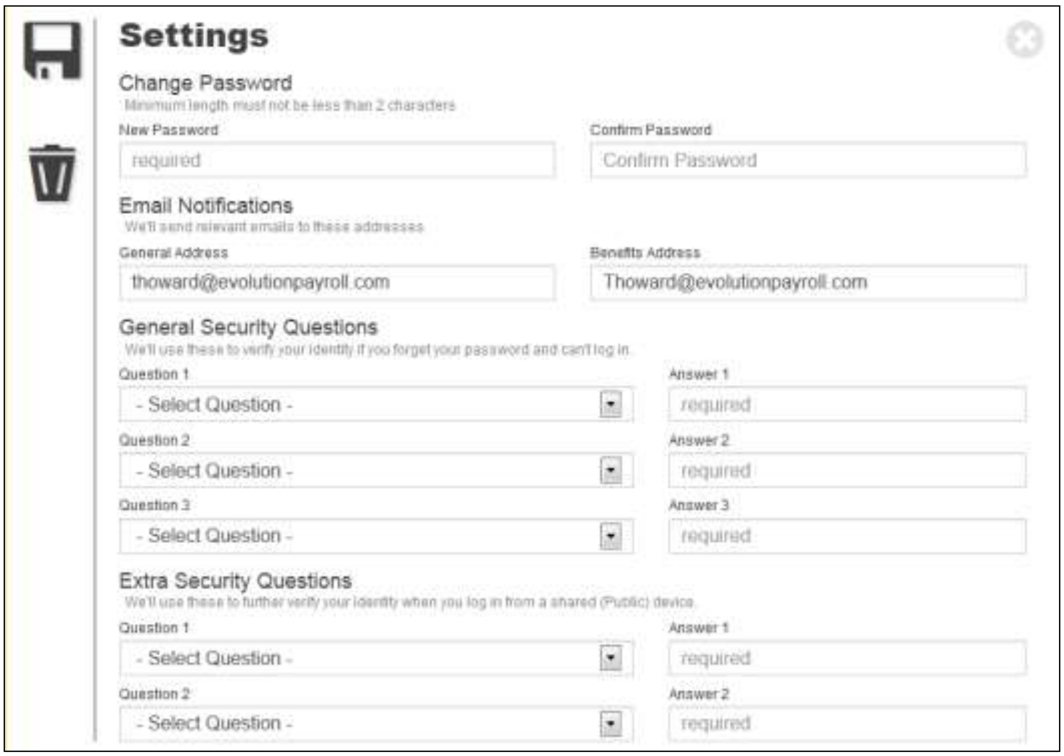
Help Button

3. Click the **Help** button for contact information (set up on the Company – Contacts – Details tab.)
4. Click the **X** in the corner to close the box.

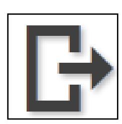


Settings Button

5. Click the **Settings** button to change a password, add or edit email addresses, and reset security questions.



6. Click the **Save**  button.



Exit Button

7. Click the **Exit** button to log out of the Employee Portal.

Manager Approvals

There are two items requiring approval for which managers are responsible:

- Time Off Requests, and
- Personal Info Change Requests.

Information about items requiring approval are displayed in the Message Tile of the Dashboard.

Managers are able to enter time off requests for employees as well.

In addition, managers are responsible for creating and managing the links to the Resources and Messages displayed on the group's employees' Dashboard.

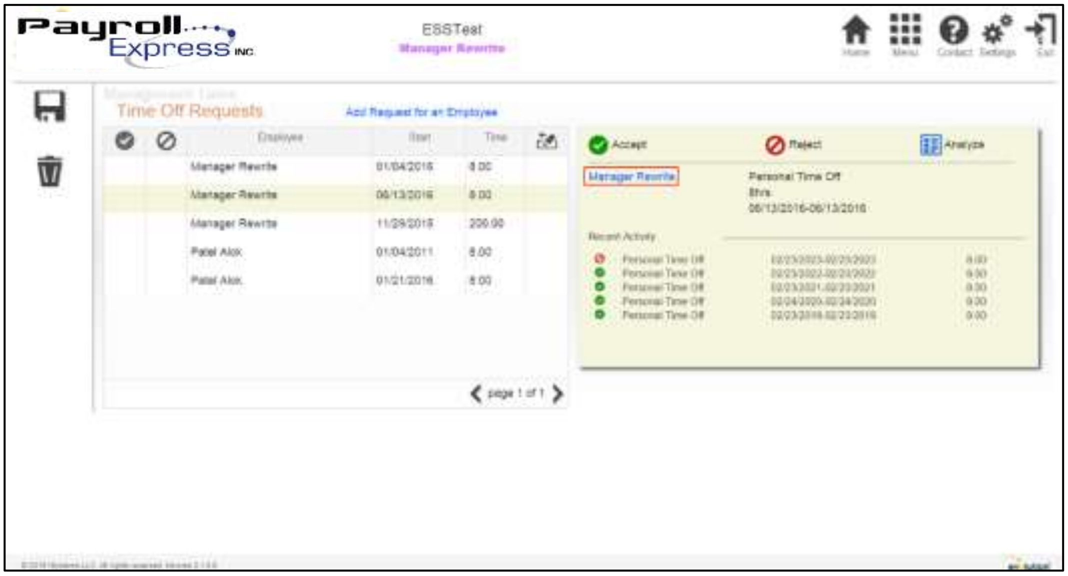
Messages Tile

Messages are created and updated as employees submit personal info change requests and time off requests via the Employee Portal. The Group Managers view these messages as links in the Messages tile on the Dashboard, on which they click to approve or reject the requests.

Approving or Denying Time off Requests

1. Click the applicable link in the Messages tile on the Dashboard.

   Result: The screen listing all of the pending Time off Requests opens.



2. Select an employee from the list of employees on the left-hand side of the screen.

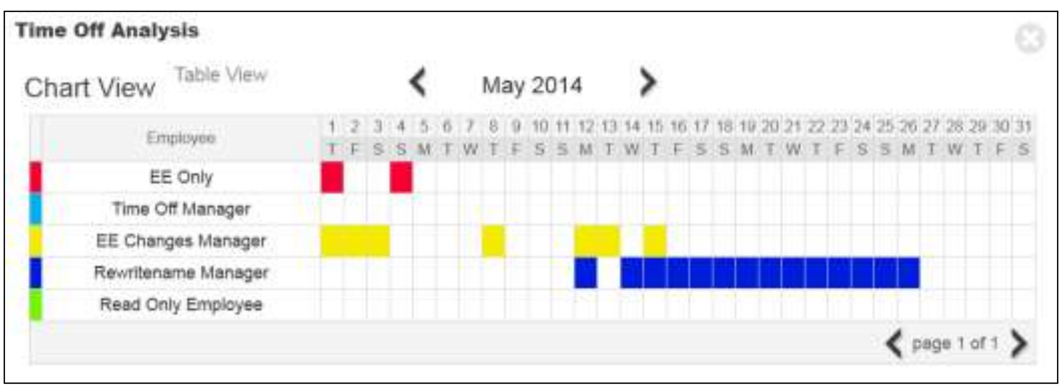
   The time off request appears in the right.

3. Also displayed is Recent Time off Activity for that employee and any conflicts the request creates.

4. Click the Analyze button to view the Time off Analysis screen to determine whether other employees are taking time off within the time requested.

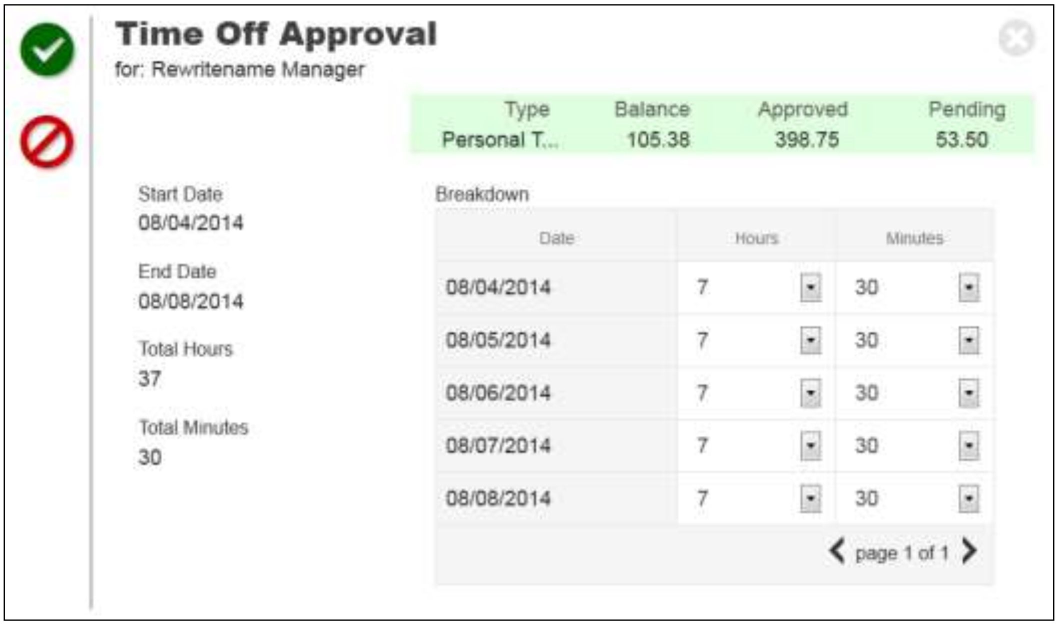
Note: The Time off Analysis button in the Navigation Buttons can also be clicked from anywhere in the application to open this screen (below).

The Time off Analysis screen opens in the Chart View (below). Click Table View to filter employees by Time off Request Status or Time off Type.



5. Click Accept or Reject **OR**

6. Click the employee's name on the right to open the Time off Approval screen and view the original Request with a breakdown by date.

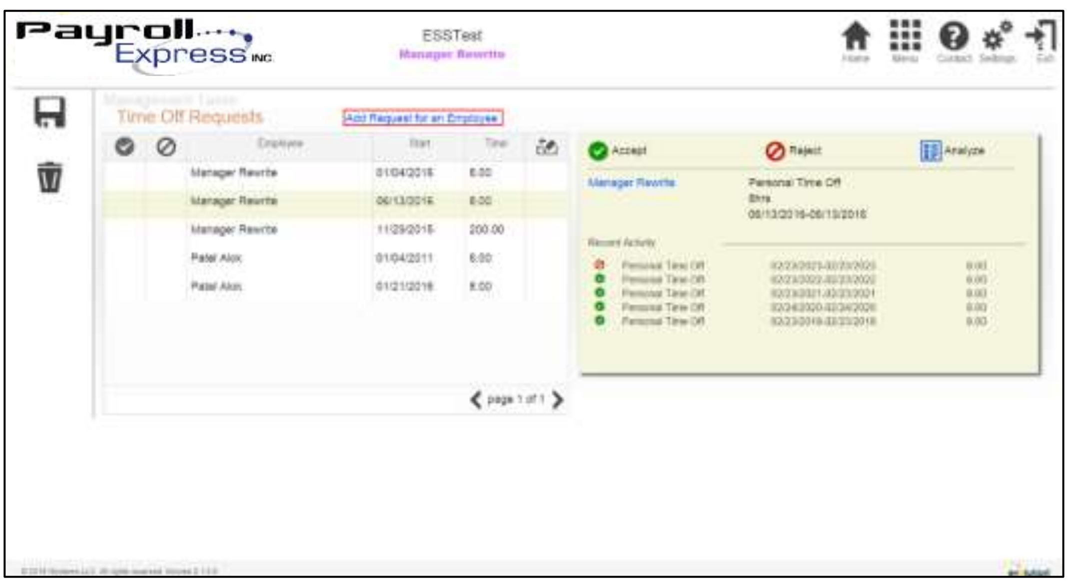


7. Make any applicable changes and approve or reject the Time off Request.
8. Click the **Save** button in the Navigation panel on the left-hand size of the screen.

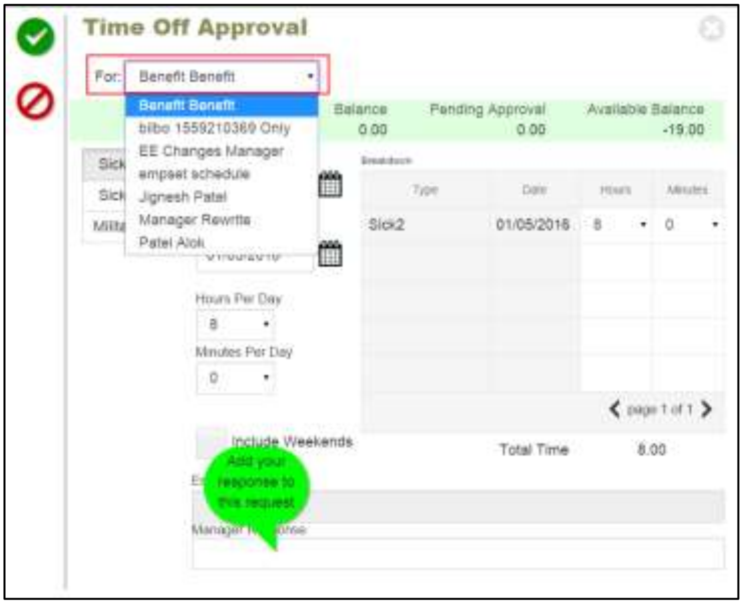
Submitting Time off Requests for Employees

1. Click the applicable link in the Messages tile on the Dashboard.

   Result: The screen listing all of the pending Time off Requests opens.
2. Click **Add Request for an Employee**.



Result: The Time off Approval screen opens.



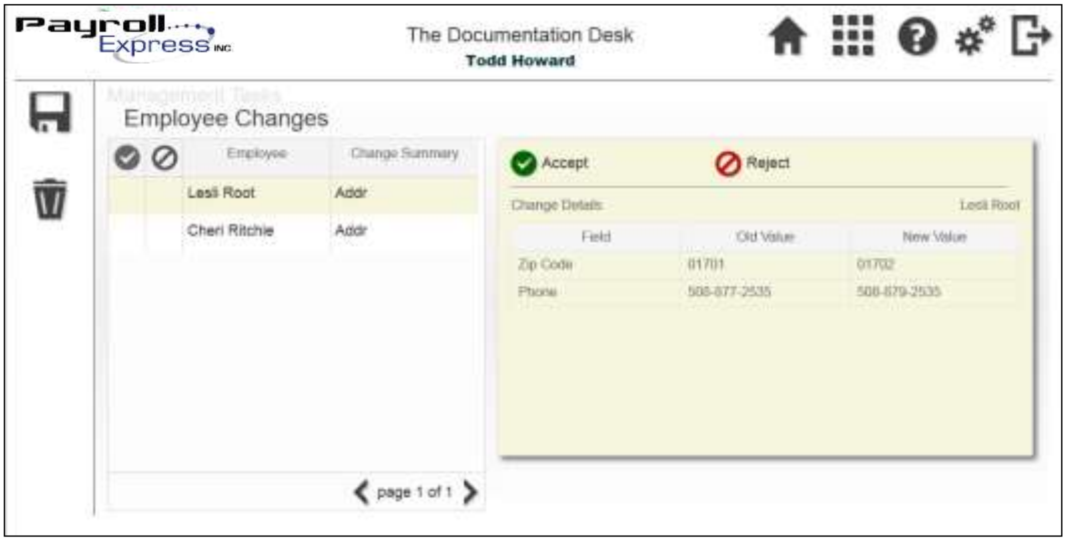
3. Select the employee for whom the Time off Request is being entered from the **For:** dropdown list.
4. Select the type of Time off Request being submitted (Personal time, Sick time, etc.)
5. Select the **Start Date** and **End Date** of the time period.
6. Enter the **Hours per Day** requested.
7. Select the **Include weekends** checkbox if the time request includes weekend days that would normally be worked.
8. Enter any notes if applicable (optional).
9. Edit hours on the right side of the screen, if applicable.
10. Click **Accept** to submit for approval.

Personal Info Change Requests

1. Click the applicable link in the Messages tile on the Dashboard.

   Result: The screen listing all of the pending Employee Change Requests opens.

The list of employees with change requests is on the left-hand side of the screen.
The time off request(s) appear in the right, and include the Field, Old Value, and New Value for the manager's consideration.



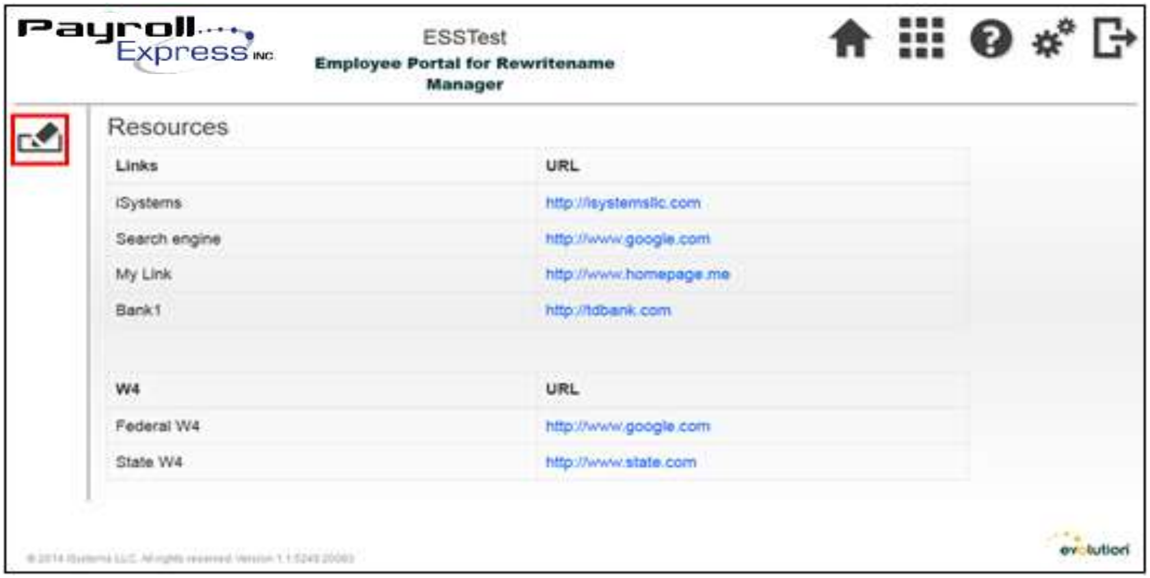
2. Click each employee to view the change details.
3. Click **Accept** or **Reject** above the Change Details.
4. Click the **Save** button in the Navigation panel on the left-hand size of the screen.

   Result: The employee receives an email that the Manager has approved his/her changes; the employee's information is changed in the Employee Portal; the message disappears from the Manager's dashboard, and the changes are posted in evolution.

5. Click the **Messages** button to view and/or change messages displayed in that tile on the Dashboard. Any messages added by the Manager are displayed on the Dashboard of the employees.
6. Click within the text box to edit or add new information. This page is read only for users who are not managers.
7. Click the **Save** button in the Navigation pane on the left-hand side of the screen.

8. Click the **Resources** button to access links displayed in the Resources tile on the Dashboard. These links are pre-defined and managed by the Group Manager.

9. Click the **Edit** button in the Navigation pane on the left-hand side of the screen to add or edit a resource and it's link.



10. Add Resources and the URLs.

11. Click the **Save** button in the Navigation pane, which is displayed once the user is in Edit mode.