ELMO

Version 6

Electronic Leave Management <u>O</u>rganizer.

User's Guide

<u>United States Bankruptcy Court</u>
Northern District of New York

U.S. BANKRUPTCY COURT, NORTHERN DISTRICT OF NEW YORK

ELMO User's Guide

U.S. Bankruptcy Court
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Welcome

Welcome to ELMO.
ELMO is an automated leave management system that was created to facilitate an easy, fast, and fun way to request leave without the use of a paper leave slip. The leave request is sent electronically to the supervisor for approval. ELMO also adds many time saving functions such as:

- Easy Interface – One easy screen to request leave.
- Useful pre-designed reports.
- Review submitted leave slips with ease.
- Forecast projected leave balances for anytime in the future.
- Ability to print any leave request if needed.
- Use/Lose reminders.
- Powerful Leave calendar with many options.
- Most of all, it's fun to use.

Who is this manual for?

This manual will show you how to get around the ELMO menu system. It will show you how to request leave, show you how to view your leave requests and also help you plan your future leave.

How do I run ELMO?

On your desktop there should be an icon that looks like this: Just click (or double click) on the icon and the ELMO login Screen will pop up.

I DON'T HAVE AN ELMO ICON!
Simply call your systems department and they will install the ELMO software on your computer.

Login Screen

How do I login to ELMO?

Type in your login name and password given to you by your personnel specialist and click the Login Button.

I DON'T REMEMBER MY LOGIN OR PASSWORD!
Simply call your personnel specialist and they will be able to issue you a new password or tell you your login name.

> *Error: Database error connecting to ELMO. Call Systems.*

ELMO can't find the server so call your systems department and let them know.

> *Error: Invalid Login or Password.*

The login name you entered or the password you entered did not match the login ID or password on file. Please check the login ID and make sure you typed it in correctly. Retype your password.

If that didn't work, make sure you have your CAPS LOCK off. Passwords and login IDs are case sensitive.

If you still can't get in call your personnel specialist and they will be able to help.

Error: You have exceeded the maximum login attempts.

You get three tries to enter a correct login ID and password. After your third try ELMO shuts down and you must restart the ELMO program to try again.

Did you know???

ELMO remembers the last successful login ID. Usually all you will have to do is start typing the password once the login screen comes up.
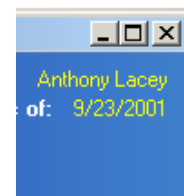
User Interface

1.   **Current User Bar**

2.   **Menu Bar** (**See Section IV**)

3.   **Interface screen**. This changes depending on which function in ELMO you are actually working on.

4.   **Message Bar** (**See section V**)

How do I exit ELMO?

To Exit, click the little X in the upper corner of the screen:

Did you know?

The ELMO program can be resized to many different sizes. Resize by holding your cursor over the bottom right corner of the program and then click and hold the Left Mouse Button and drag. ELMO will even remember the size each time you login.

Menu Bar

This menu bar is at the top of every screen in ELMO. It is a quick way of getting around ELMO. From any screen in ELMO you can get to any other by just using this menu bar.

At most screens, there is no OK button or Accept button to end a transaction. You don't need one. If you are in the middle of entering a leave request and want to skip over to the calendar just click on the calendar button.

Some of the menu buttons have sub menus attached to them. For example:
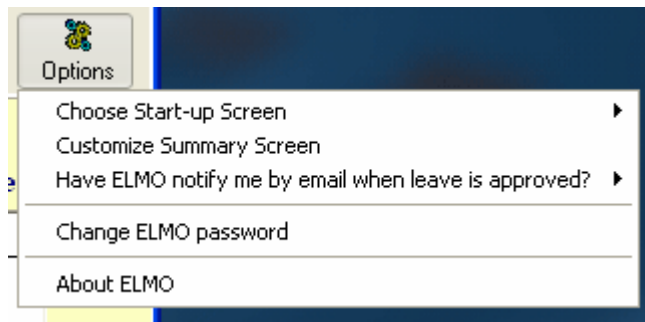
If you want to exit a sub menu without choosing any of it's options just click anywhere else and the menu will close.

Menus with a little triangle after the words mean there is another sub menu pertaining to it. There is an example of this in the menu above.

Message Bar

Your use or lose balance is 3.50 hours of Annual Leave.   2 Alerts

You'll find this at the bottom of every screen in ELMO. It will tell you if you will have use or lose, it will tell you if you have leave that is going to expire soon and it gives you informational messages from ELMO, like when your leave request was successfully sent, etc.
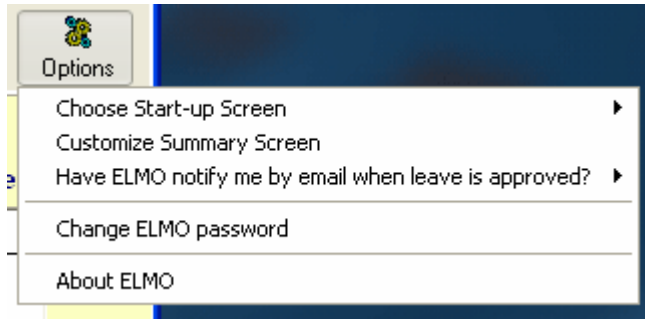
If you have more than one message, it will show you the total number of messages in the bottom right corner. Every 5 seconds the message showing will change to the next message in a different color. Once they have all been shown it will repeat.

No Alerts

Most of the time the button in the bottom right corner of the screen will say, "No Alerts". But other times (as seen in the full bar picture above it will show the number of current alerts. You can click on this button to bring up an information box that will show all alerts at one time.

INFORMATION   ☒

1. Don't forget to submit your certification report

2. Your use or lose balance is 3.50 hours of Annual Leave.

Close
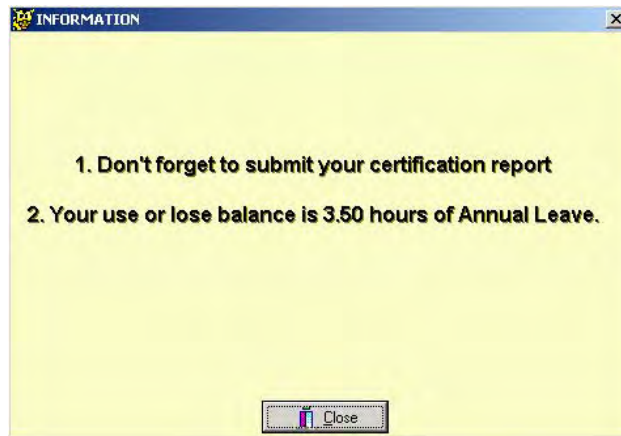
Changing your Options

Choosing a New Start-Up Screen

The first screen you see in the interface section is up to you! Right after you log in you can have ELMO bring you directly to the Balance Summary screen, the Calendar, or right to the Request Leave screen.

Just click on **Choose Start-Up Screen** and you'll see your choices. Click on the one you want and that's all there is. The next time you log into ELMO you'll be at your new Home.

Having ELMO email you when your leave is approved.

When this is set to yes ELMO will email you and let you know as soon as your manager approves (or deletes) your leave slip.
Option is grayed out
If this is grayed out, contact your Personnel Administrator. She may need to add your email address to the system.

Changing your ELMO Password

Clicking on **Change ELMO password** brings you to this screen:

Type in your current password (the one you just used to get into ELMO) and then type your new password in the

next two boxes. ELMO will not show the letters you type but instead will show an *. This is a security feature so someone behind you will not be able to read your passwords on the screen.

What is a valid Password?

ELMO requires you to make your password at least 5 characters long. The password can be letters or numbers. Generally speaking a password should be made up of a combination of letters and numbers. It shouldn't be your name or spouse's name. It should be something near impossible to just guess. For example: **fried88chicken** or **mission0192impossible**.

Customize Summary Screen

ELMO allows you to show on your balance summary screen only the leave types you want to see.

Just click on **Customize Summary Screen** and you'll see this:

Customize Summary Screen
Put a check in front of each type of leave you want to have on your summary screen.

☑ Annual Leave
☑ Sick Leave
☑ Admin. Leave
☑ LWOP
☑ Comp. Leave
☑ Seminar
☐ Jury Duty
☐ Military Leave
☑ FFLA Used
☑ FMLA Used
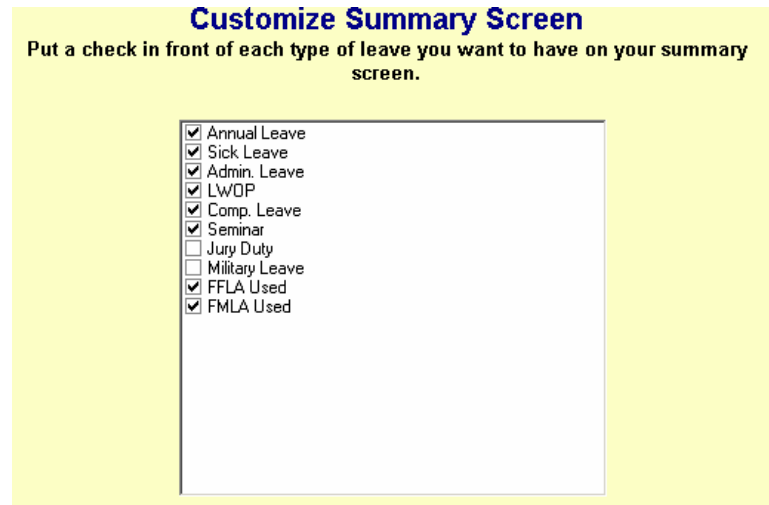
How do I save my changes?

Leave types with a checkmark show up on your balance summary page and the others do not. Once you make any changes just go to any other screen or exit the program and ELMO saves your changes automatically.

Balance Summary Screen

Leave Balance Summary				
	Beginning	Accrued	Used	Balance
Annual Leave	0.00	0.00	0.00	0.00
⊟ Sick Leave	0.00	0.00	0.00	0.00
- Future		0.00	32.00	-32.00
Admin. Leave	0.00	0.00	0.00	0.00
LWOP			0.00	
Comp. Leave	0.00	0.00	0.00	0.00
Seminar			0.00	
Jury Duty			0.00	
Military Leave	0.00	0.00	0.00	0.00
AWOL			0.00	
FFLA	0.00	0.00	0.00	0.00
FMLA	0.00	0.00	0.00	480.00

This screen shows your leave balances for the types of leave that you requested to be on your balance summary screen.

To change the types of leave shown on this screen see: **Section VI: changing your options**.

Plus Sign – Extended Leave information

Some leave types may have a plus sign in front of it. Clicking on this plus sign will drop down more information about that leave type. For instance, if you have any future transactions, or if you have been advanced leave.

Beginning Balance
This is the beginning balance as of the start of the current leave year or it was your balance when you started using ELMO.

Accrued
The amount of leave you have accrued since the beginning of the current leave year. This total only reflects leave given to you up to the last closed leave period. The date shown in the Current User Bar - **Leave balances as of** shows you up to which date the leave balances are reflected.

Used

The amount of leave you used since the beginning of the leave year. This amount also only shows leave that was taken up to the **leave balances as of** date.

Balance
This is your current leave balance as of the date in **Leave balances as of:**

Future (if shown)
This is the amount of leave that you have requested that is in a period that hasn't been closed by your personnel specialist yet. For example: If ELMO currently shows you **Leave balances as of: 5/6/2001** and you have a leave request for 8/8/2001, ELMO will show these hours here because technically they are not in your current leave balances.

Advanced (if shown)
This is the amount of leave that has been advanced to you. It will show the total advanced and the total you have paid back and the remaining hours to be paid back.

Requesting Leave

Only one screen?   Is it really that simple?

Yes, everything you need to request leave is right here. ELMO customizes the questions based on what kind of leave you are requesting. After filling out this easy form all you need to do is press the [✔ Submit Leave Request] button and your leave will be submitted to your supervisor.

Step 1: Choose Type of Leave
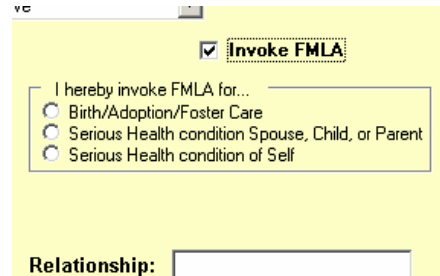
To start, just click on the little down arrow on the box that shows the leave type. This will show you all the different kinds of leave you are able to request.

There are also Donate, FFLA, and FMLA checkboxes that will show up depending if the current leave types support them.

Example of Donating Leave Screen. Just enter the name of the person you are donating to and the amount you want to give. Some courts also require extra paperwork to be filled

out so please contact your personnel specialist for your court's procedure for donating leave.
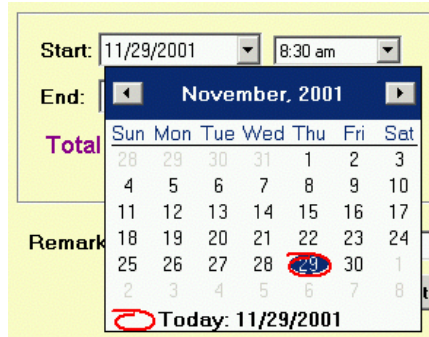
If you do select FFLA or FMLA, additional questions might show on your screen. Fill these out too. For example, requesting FMLA leave you also have to fill out the reason for the FMLA request and the relationship of the individual you are taking the leave for.

Step 2: Adjust leave times and dates

Fill in the start date/time and end date/time.

Click on the little down arrows to drop down a calendar to pick from on the date questions and a list of valid times on the time questions.

The Total Hours Leave will reflect the number of hours that you would have to request if you were to request this leave.

ELMO knows your leave schedule and will only show you the times that are valid to your day. For example if on Mondays you work 7:00 am – 10:00 am, ELMO will only show you the hours between 7 and 10. Also, if you were to select Monday to Friday ELMO would only take into account your hours of 7-10 on Monday when calculating the full week. If you typically have every Wednesday off, ELMO knows this too and will not count these days. Nor will it count Holidays that fall within the dates you specify.

Step 3: Enter any remarks

Enter any remarks you want on the leave slip in the **Remarks** section.

Step 4: Submit the leave

Press the [✔ Submit Leave Request] button to have ELMO check to see if you have enough hours or if there were any errors.

After clicking the [✔ Submit Leave Request] button you will get one of two screens.

What will I see if the leave is valid?

This screen means you have enough hours to take the leave you requested. It also is asking you to agree to the leave statement.

You can still cancel the leave request at this point by clicking on the Cancel button. You will get a confirmation box that says, "Are you sure you want to cancel this leave request?" After that you will be brought back to the request leave screen.

After clicking on **Yes, I agree to the above statement** the leave request will be sent electronically to your supervisor for approval. If you have Email Notification turned on in your options you will get an email shortly after your manager approves your request.

What if something was wrong with the leave request?

This screen shows that there was a problem with the leave request. Whatever the problem was, ELMO will tell you in RED at the top of the screen. A number of things could be wrong.

- **You did not have enough leave**. ELMO will tell you exactly how much leave you did have to take at the start of your leave.

- **You already had leave requested for the same time period**. Just click the OK button and fix the leave and resubmit.
- **You had future leave that made it so you couldn't take leave now**. If you get this error it's because ELMO allowed you to take leave for some future date but if it allowed you to take the leave you're requesting now you wouldn't have enough leave hours to take that future leave. Either change your leave or delete the future leave.

 WAIT A MINUTE! I'M SURE I HAVE ENOUGH LEAVE. WHY IS ELMO TELLING ME I DON'T?
Simply call your personnel specialist and let them know your problem and they will help you work it out.

How smart is ELMO?

Not only does ELMO know your schedule and takes that and holidays into account when you request leave it also knows how much leave you will have at a future date. Even if you go to a new leave earning level. For example, even if your leave balances currently show only 10 hours ELMO knows that you will have earned another 10 hours for 2 months from now and let you request up to 20 hours on that date. If in one month you went from earning 4 hours a pay period to 6 hours, ELMO would allow you to take for example the full 22 hours at that later date.

Viewing Leave

How do I view my past leave requests?

In the menu bar click on **View** then on **Leave Requests**.
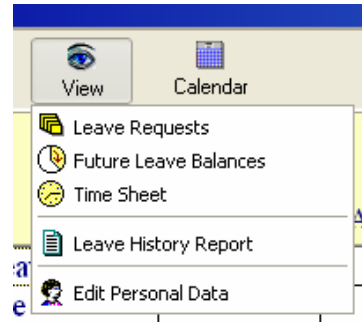
You will then see a screen similar to this:

This screen shows all your past and future leave requests.

Leave shaded in yellow is leave that is already reflected in your leave balances. This will change as your personnel specialist closes leave periods.

You can also change the drop down Include leave from past # days. This will let you customize the amount of leave requests on this screen.

How do I view a leave slip?

To view the leave slip either double click on a leave request or right click the leave request and click on **View Leave**.

When the leave slip viewer opens you'll see this menu at the top of the screen:

Print **Zoom** **Exit**

Page navigation **Show whole page**

Leave Slip Sample:

MY LEAVE SLIPS DON'T HAVE SIGNATURES?
Some courts don't use signatures in ELMO. If your court doesn't use signatures you might see the signatures replaced with the typed equivalent.

Deleting a leave request

To delete a leave request just right click on the leave request and select **Delete Leave** from the pop up menu.

You can't delete leave that has already been approved. If you need to delete the leave you need to call your supervisor and ask them to delete it or un-approve it.

Sorting my leave requests

To sort the list differently, double-click on one of the headings, such as **Type of Leave** or **Start Date**. This will sort your leave in a new way.

Future Leave Balances

In the menu bar click on **View** then on **Future Leave Balances**.
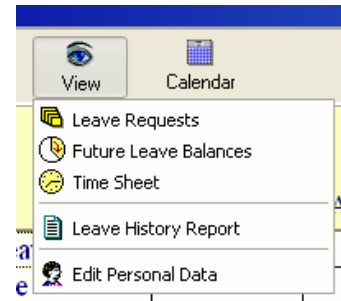
You will then see this screen:

Click on the little down arrow on the white date box and change the date to any date in the future to see your balances.

You also have three other options to consider when checking your future balances:

1. **No future leave requests**. – This gives you what your leave balance would be on a certain date without taking into account the leave you have requested from the last closed pay period to the date you selected.
2. **Include requests up to date**. – This will calculate your balance on that date including all the leave requests you have submitted from the last closed period to the date you chose.
3. **Include all future requests.** – This gives you your balance on the date you chose but includes all leave requests even if their date is after the date you chose.

Time Sheet

In the menu bar click on **View** then on **Time Sheet**. This option may not be available if your HR department has not activated the Time and Attendance Module for ELMO.
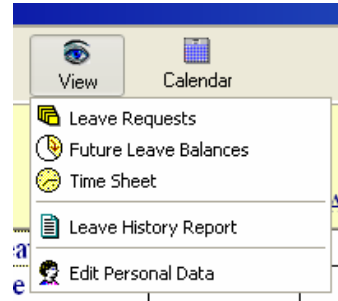
You will then see this screen:

Based on options set by your Personnel Specialist this screen will work in one of two ways. If you are using the ELMOTIME Module then the times in each box will be filled in by that. You will be getting actual times your computer is turned on and off. You won't be able to edit these values. If you need these values changed check with the person your court as specified as the Time and Attendance Editor.

When NOT using the ELMOTIME Module, these times will be filled in using your scheduled time for the day. You may or may not be able to edit these values based on the options set by your Personnel Specialist.

If you are able to edit these times then please use the format 2:00 pm or 8:00 am, etc.

Holidays are automatically added to your time sheet and leave you request with ELMO is automatically entered here as well. So if you requested leave from, for example, 1-5pm, you would only see your times from 8-1pm. You will not be able to edit the Leave Taken boxes.

Certifying your time sheet

Each day, or anytime in the two week period you can access this time sheet and certify each day by placing a checkmark in the Certify box preceding each days time.

Once you certify each day the Certify Time Sheet Button will become enabled. When you click this you will be certifying that your time worked is correct and ELMO will then electronically send this report to your manager.

Un-Certifying your time sheet

If you discover an error after certifying, you will have to contact your manager to Un-Certify the time sheet. After they un-certify it you will them be able to fix the time sheet and recertify.

Personal Data Editor

In the menu bar click on View then on **Edit Personal Data**.

You will see a screen like this:

This screen can change depending if your Personnel Specialist allows editing and what information your particular court tracks. In the example above the fields that are white are fields that I can edit and keep up to date. Fields that are grayed out are there for your information and to view but you cannot edit them. If they are incorrect please see your personnel specialist.

Leave History Report

The leave history report lists your earned and used leave for a period of time that you choose. It will show each leave request and any leave that you earned.

Viewing a leave history report

To view the leave history report, in the menu bar click on **View** then on **Leave History Report.**

From there set the *from* date and the *to* date and click the **View Report** Button.

Leave Calendar

Viewing the leave calendar

To view the leave calendar click on the Calendar button on the menu bar.

You'll notice that the Current User Bar disappears. This is so you have more room to view the calendar. But as you notice, you'll always have access to the menu bar.

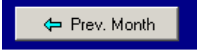Each day shows all the leave requests taken and any special events for that day.

The current day is high-lighted in yellow.

If there is not enough

room to show all the events for that day, ELMO will show a little red triangle down in the bottom right corner of that day. Click inside the day box and you'll be able to scroll down and view the rest of the events.

Entries on the calendar can be grayed out. This means the leave request has been requested but it is still pending approval from their manager.
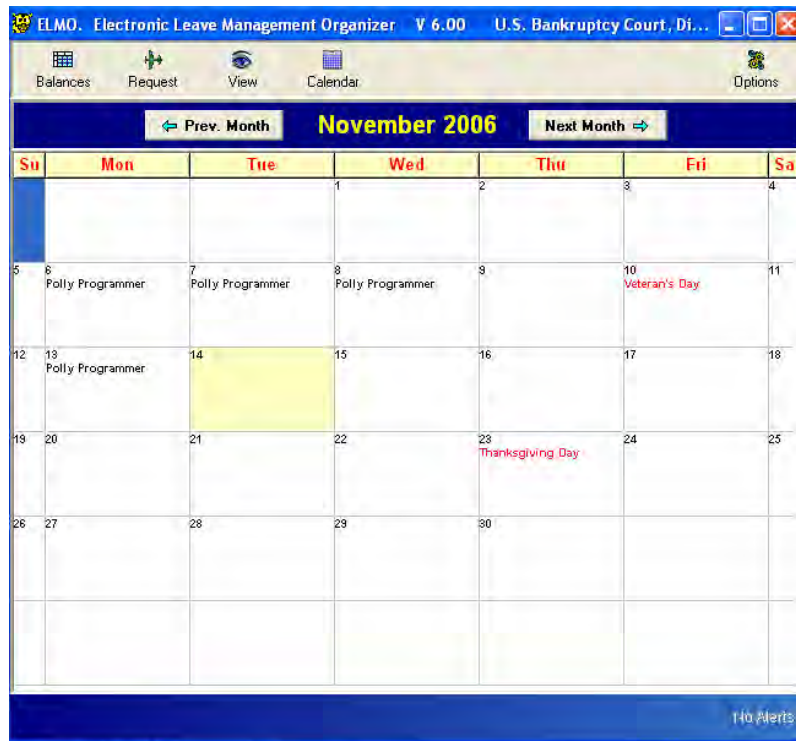
You can resize the ELMO interface by holding your mouse cursor over the bottom right corner of the ELMO window and then press and hold the left mouse button and drag. The calendar will resize and you'll be able to see more names and events.

Use the ⬅ Prev. Month and Next Month ⮕ buttons to go to the previous month and next month, respectively.

Quick Navigation

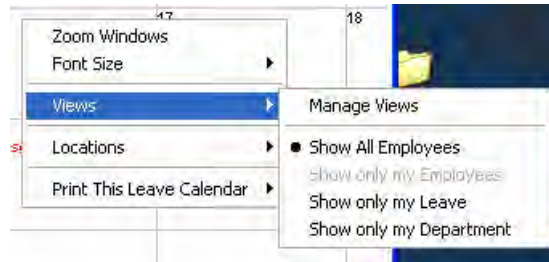You can click on the MONTH at the top of the screen to access this menu:

From here you can quickly go to today's date or another month.

Custom Views and Options

Right click on the calendar to bring up the Calendar Options Popup menu.

Whenever you change something in this menu ELMO will remember them for future sessions.

Zoom Windows

When there is a checkbox in front of this option you will get an extended day box that is bigger than the regular size day box when moving around from day to day. It shows more information if you have the ELMO window sized small. Just click to turn this option on or off.

Font Size

Will change the font size for all text on the calendar screen. Pick the one you like and ELMO will remember it.

Views

This will let you choose which people to show on your calendar. You can Show All Employees or Show only your leave or Show only your department.

The Show only your department will show all people that have the same supervisor as you in ELMO.

If you select Show all Employees but you can't see all employees, first check to make sure the Locations entry shows all locations (See below). If that still doesn't work, contact your Personnel Specialist.

Managing Views
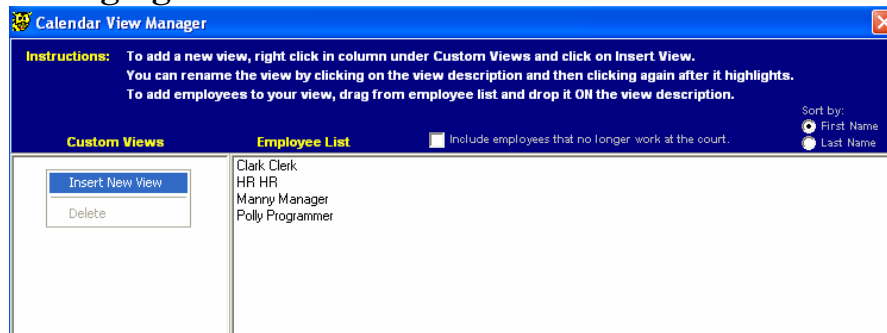
On this screen you will be able to create a view called anything you want and select only the people you want to be on the calendar. Under the Custom Views Column if you Right Click you will see the popup menu above. Insert a New View. Name it anything you want and then drag and drop employee names from the right to the view of the left. When you are done, press the X in the upper right to close the window. Now you will be able to select that view and only see those people you placed there. You can also right click on a view on this screen and delete it or rename it.

Locations
If your court has multiple locations you'll see this option. Otherwise you may not see it. Click on the location you want to see and ELMO shows only those employees at that location.

Printing a leave calendar
You have two options when printing the leave calendar.

List view: Prints the calendar using the same filtering criteria that you are currently using.

Leave Calendar for November 2001.

Calendar view: This view prints a full-page calendar with all the leave events and holidays. It doesn't matter how many leave names are showing on the calendar on the screen, more will show on the printed form. If you have too many names for a given day than will fit on the calendar day box ELMO will print an overflow message in the box and the names that didn't fit will print out on page two.

Delegating

A manager can delegate their leave approving authority to you in their absence. If this is the case you will see an addition to your ELMO menu bar.
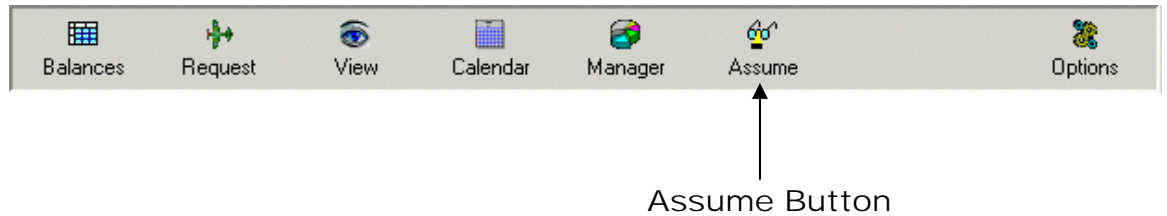
Assume Button

The Assume Button
When you click on the Assume button it will popup a submenu with the command **become**. Hold your mouse over the **become** command and it will show you each manager that is delegating to you. Just click on the manager you want to login to ELMO as.

Once you click on one, your ELMO will look just like you logged in as that manger, except that it will have a message stating that **You are currently assuming** as seen above.
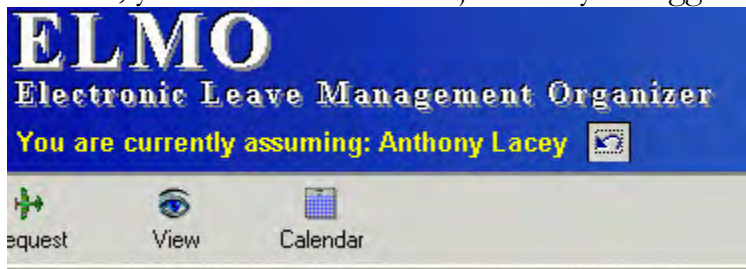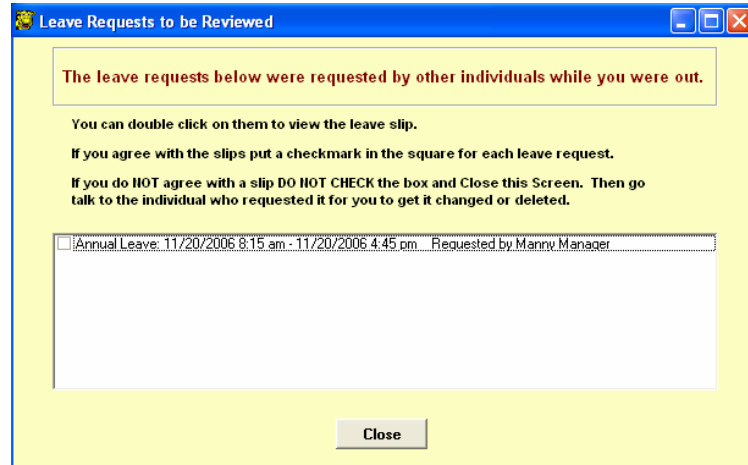

When you want to get back to yourself just click on the arrow button.

If you are not familiar with managerial functions in ELMO please read the ELMO Manager's guide.

Leave Requests to be reviewed

If, when logging into ELMO you may receive a screen that looks like this:

You may never see this though if your court doesn't require review

of leave requests by you if submitted by your manager while you were out.

If your court does have this option turned on anytime someone enters leave for you, you will get this popup message that you are required to respond to.

You can double click on each request to view the leave slip.

If you agree with the leave submitted

Place a checkmark the box in front of each leave request listed and then close the box. Each leave request will be appended with a note on it that you have reviewed the slip and the date reviewed.

If you do NOT agree with the leave submitted

Close the box. You will not be allowed into ELMO. Contact the person who submitted the leave request for correction.