

Flexar

putting flex work to work

Manager Options



Manager Options

- Process Proposals of Employees
- Approve, Decline or Request Modification of the Proposal
- Print Proposal (open a PDF)
- Terminate an Arrangement
- Perform Evaluation of Arrangement
- Perform a Survey
- Change Password (for non-SSO configurations).

NOTE: In the following slides the notes or annotation for the slide are text boxes inserted in the slide.

This is a sample of the notes or annotations text box as they will appear in the following slides – text is red, italic, Ariel, 12 or 14 pt. The boxes have no outline and vary in transparency.

LandingPage Options

Feature and Configuration Test Site

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just use it!

Flexibility Portal

This is the official FM_Test1 of tools for Managers and Ass work arrangements to improve their work effectiveness. The Flexibility Toolkit includes self-assessments, training, best practices segments and the Flexibility Monitor.

This is the LandingPage or the 'Flexar Portal' – providing access to all parts of the Flexar system and collaborative systems like the Orientation and Toolkit. It is completely customizable.

To get the most out of this system, we strongly recommend that first time users go through the Orientation and Toolkit first. On return visits you can go directly to the most relevant material.



ORIENTATION

to the groundrules and the process for proposing

TOOLKIT

provides an overview of all options, training and FAQs

ASSOCIATE PROPOSAL

connects to the on-line system to create or edit proposals

MANAGER PROCESS

enables the manager to process associates' proposals

ADMINISTRATOR ACCESS

allows maintenance of the Flexibility Monitor system

The Manager Menu is accessed by clicking the "Manager Process" box.

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Flexar

Manager Home

Feature and Configuration Test Site

This banner is customized per client specifications to appear as part of their intranet (instead of a cloud-based service) and is presented at the top of every page.



Home

Logout

Welcome to Pipersoft's operations for Managers to process proposed Flexible Work Arrangements and manage the existing arrangements. For details on each operation select the Help entry below.

Manager Options Menu

- **Process Proposals: Approve, Decline, Request Modification**
- **Access Arrangement, Current and Previous**
- **Select Arrangement for Evaluation or Survey**
- **Change Password**
- **Help**

The text can be re-phrased as a "Registration Process" as opposed to a "Proposal Process".

Menu options can be excluded to meet your needs.

The text between the "Home" bar and the "Manager Options Menu" is optional and customizable.

Process Proposal

Processing a proposal is a 5 step process:

- 1) Select the Proposal to process.
- 2) Present the Arrangement **Detail** – change the start and proposed end date, if needed.
- 3) Review and comment on the proposed **Schedule** (Onsite and/or Offsite)
- 4) Review and comment on Employee Responses to **Proposal Questions**
- 5) Provide management **Decision** on the Proposal.

Select Proposal

Home Logout

Select Proposal

Person Last Name: Status: Created From: Created To: *Various search options.*

Last Name	First Name	Arrangement Name	Status	Create Date	Start Date	End Date
Lane	Lois	Lane Lois_Remote Work_2012/08/07	Submitted	8/7/2012	8/15/2012	
Smith	Bob	Smith Bob_Telecommuting_2012/10/01	Submitted	10/1/2012	10/8/2012	10/3/2013

The Proposals ready for management processing of Employees who 'direct report' to the current user are displayed. If there are more than 1 levels of management approval required, then proposals of 'indirect reports' ready for their level of review will also appear in the list.

Process or Print the highlighted proposal.

Page 1 of 1 Displaying 1 - 2 of 2

Details

Home

Logout

[Details](#)

Schedule

Proposal Questions

Decision

EMPLOYEE

First Name: Ben
Last Name: Franklin
Employee ID: A100006

*Display the applicant Person Profile
or Print the current proposal.*



Person Profile



Print Proposal

FLEX WORK

FLEX WORK TYPE: Offsite Work

I work remotely and onsite in the same state.

*Modify the Proposed
Start or End Date of
the current proposal.*

Proposed Start Date: 8/29/2014

Expected End Date: 8/21/2015

Agreement Date: 8/26/2014

Save

Next >

Details

Home

Logout

[Details](#)

[Schedule](#)

[Proposal Questions](#)

[Decision](#)

EMPLOYEE

First Name: Ben

Last Name: Franklin

Employee ID: A100006

 Person Profile

 Print Proposal

FLEX WORK

FLEX WORK TYPE: Offsite Work

I work remotely and onsite in the same state.

Proposed Start Date: 8/29/2014

Expected End Date:

Agreement Date:

Calendar for August 2014:

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today

Dates can be provided using "date selection controls" to ensure valid dates.

Save

Next >

Person Profile

Home

Logout

Details

Schedule

Proposal Questions

Decision

Employee

First Name:	Bob	Personnel Area:	East
Last Name:	Smith	Personnel Sub Area:	Northeast
Staff ID:	100015	Cost Center:	Boston
Email:	richard.latty@soleng.com	Employee Group:	Sales
Manager Name:	Dan Quayle	Employee Sub Group:	Super Sales
2nd Level Manager Name:	John Mill	Hire Date:	11/25/2003
HRBP:	Ben Franklin	Level:	08
Job Title:	Sales	Exempt Status:	E
Function:	Selling	Company Name:	Amgen
Org Unit:	Sales	Vice President:	John Adams
Org Unit Number:	16	Country Code:	US

Personnel Profile of the applicant may be used by their Manager in making their decision.

Save

Next >

Schedule (option 1)

Home

Logout



Day	Current Schedule				Proposed Schedule			
	Onsite		Offsite		Onsite		Offsite	
	Earliest	Latest	Earliest	Latest	Earliest	Latest	Earliest	Latest
Mon	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Tues	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Wed	8:00 AM	5:00 PM					7:00 AM	4:00 PM
Thurs	8:00 AM	5:00 PM					7:00 AM	4:00 PM
Fri	8:00 AM	5:00 PM			8:00 AM	5:00 PM		
Sat								
Sun								

Manager may comment on the schedule if they require a change. They may change the Schedule as needed if this option is enabled in the configuration.

Schedule Comments

We discussed a schedule of 3 days out of office. Let's start with the 2 days and see how it goes. I think Wed & Thur are the best days to not be in the office.

The Previous and Next buttons perform an implied "Save" on every panel.

Save

< Previous

Next >

Schedule (option 2)

Home

Logout

Details

Schedule

Proposal Questions

Decision

Day	Current								Proposed							
	Office				Remote				Office				Remote			
	Early		Late		Early		Late		Early		Late		Early		Late	
	Begin	End	Begin	End	Begin	End	Begin	End	Begin	End	Begin	End	Begin	End	Begin	End
Mon	8:00 AM	12:00 PM	1:00 PM	5:00 PM					8:00 AM	12:00 PM	1:00 PM	5:00 PM				
Tues	8:00 AM	12:00 PM	1:00 PM	5:00 PM									6:30 AM	11:00 AM	12:00 PM	3:00 PM
Wed	8:00 AM	12:00 PM	1:00 PM	5:00 PM									6:30 AM	11:00 AM	12:00 PM	3:30 PM
Thurs	8:00 AM	12:00 PM	1:00 PM	5:00 PM									6:30 AM	11:00 AM	12:00 PM	4:00 PM
Fri	8:00 AM	12:00 PM	1:00 PM	5:00 PM					8:00 AM	12:00 PM	1:00 PM	5:00 PM				
Sat																
Sun																
Total																40:00

Manager Comment

As we discussed, you may take a shorter lunch and finish earlier. My primary interest is that you have the input for your crew ready by 8:00 and you have enough time for Paris, Bussels and Milan.

Illustrates the 2 periods per day (before lunch and after lunch) Schedule capture option, if this level of detail is most suited to the client needs.

Save < Previous Next >

Proposal Questions

Home

Logout



Only proposals with complete, accurate and thoughtful responses will be accepted. All others will be returned for completion or declined. It is the responsibility of the applicant and their manager to provide an acceptable proposal. You may save your proposal as work-in-progress but submit it only when completed and ready for consideration.

1) Briefly describe your job including the functions you perform and the results you produce.

The original questions and assisting text are displayed.

Employee:

Policy and Procedures author and editor

The applicant's answers are displayed.

MGR Comments:

You do quite a bit more than this - identify your other roles - mentoring, project over-sight, project design review, performance reviews, mgt.

The manager may insert comments or directions for improving the proposal necessary for Approval.

2) How will this proposed option allow you to maintain or improve your individual performance?

Improve focused work without distractions or interruptions.

MGR Comments:

You have to give me more. I need compelling basis.

Save

< Previous

Next >

Decision

Home Logout

Details Schedule Proposal Questions Decision

PROPOSAL STATUS

Select the **BUTTON** option below to record your decision for this proposal:

- Approve - proposal is approved and **ADVANCES** to the next review or active arrangement
- Modify - request that the proposal be **MODIFIED** per the comments
- Decline - proposal is **DECLINED** with no further modifications requested.
- Save - **SAVE** the comments made to proposal without approving, declining or requesting a modification.

*Managers provide their decision by clicking one of the buttons below.
There may be as many Modify/Re-Submit cycles as needed to get it right.
The Manager may leave the proposal in the Submitted status by clicking the **Home** or **Logout** options without providing a decision. They may have a verbal exchange with the applicant regarding necessary changes and the applicant may edit their responses. This results in quality proposals without including manager comments.*

Save < Previous Approve Modify Decline

On Decision Selection

2 things happen on Decision Selection:

- 1) The Flexar ***database is updated*** to record the change.
- 2) An ***email is created***, sent to the applicant and CC'd their manager (and possibly others):
 - a) ***Approved*** – notifying them of the Approval with instructions and/or attachments, if applicable.
 - b) ***Declined*** – notifying them of the Decline with instructions, if applicable.
 - c) ***Modify*** – notifying them of the need to Modify the proposal per the comments provided in the proposal. This includes a link to the process for modifying the proposal. Only the applicant can open the link successfully. There may be a standard attachment included in the email.

Examples of these emails follow.

Email on Modify



Tue 8/26/2014 5:30 PM

FM_Test1@flexwa.com

Franklin_Ben_20140826_326

To ben.franklin@pipersoft.net

Cc tom.jefferson@pipersoft.net

This Proposal has been processed by Management and you are being requested to make modifications per the comments provided regarding your proposal. Please make the corresponding modifications and RE-SUBMIT your proposal. You may access your proposal by clicking the link below or through the Employee Menu.

https://www.flexwa.com/FM_Test1/ProcessRequest.aspx?FWAE_ProcessRequest_GUID=B02B482C-2D73-4A74-AFFA-BDCF996DF8B

- above email is automatically created by Flexar.
- “Subject:” contains the Arrangement Name.
- “From:” is the Flexar mail administrator for the client company.
- “To:” is the applicant/employee of the proposal.
- “Cc:” entry values are manager(s) and/or HR personnel.
- Text pertains to manager’s request for modification.
- Link to Edit Proposal for the specific proposal, by the applicant only.

Email on Approve



Fri 8/8/2014 1:30 PM

FM_Test1@flexwa.com

Stark_Hunter_20140807_321

To hunter.stark@pipersoft.net

Cc dan.mitchel@pipersoft.net

This proposal has been APPROVED by the last Manager in the review - no additional action regarding the proposal is required at this time. Your Arrangement will become ACTIVE on the proposed begin date.

- above email is automatically created by Flexar.
- “Subject:” contains the Arrangement Name.
- “From:” is the Flexar mail administrator for the client company.
- “To:” is the employee or applicant
- “Cc:” are manager(s) and/or HR.
- Text of email notifies parties of the Approved decision.

Email on Decline



Fri 8/8/2014 1:30 PM

FM_Test1@flexwa.com

Smith_Bob_20140519_318

To bob.smith@pipersoft.net

Cc dan.mitchel@pipersoft.net

This proposal has been DECLINED by your Manager - no additional action is required at this time.

- above email is automatically created by Flexar.
- “Subject:” contains the Arrangement Name.
- “From:” is the Flexar mail administrator for the client company.
- “To:” is the applicant/employee of the proposal.
- “Cc:” entry values are manager(s) and/or HR personnel.
- Text of email notifies parties of the Decline decision.

Summary of Processing Proposals

- 4 simple tabs in the wizard-based process.
- All presented data (text and captions) are stored in the Flexar database to enhance customization.
- All captured data (user input) are stored in the Flexar database to enhance collaboration, reporting & re-use.
- a Proposal PDF file is accessible that records and formats values of the Proposal at time of submission.
- An email is automatically created to alert the related parties of the outcome (see the email slides).

NEXT STEPS

Your company could be enjoying the benefits of **Flexar** within 3 weeks for less than you expect.

There is nothing to buy, no hardware or specialized software to acquire. Users need only a browser (on their computer, notepad or phone).

You can view the Flexar Administrator Options Menu presented in the Walkthrough section.

If you have any questions or would like to schedule a Flexar demonstration, please call 240-602-1127 and ask for a Flexar specialist or email support@pipersoft.net with your request.

If you would like a cost quote and proposal, please call the above number and ask for a Flexar Sales specialist or email your request.