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Global Unity for GEO

User Guide for Client Managers

Document ID

Document Type	Status	Name
User Guide	Published	Global Unity for GEO – User Guide for Client Managers

Revision History

Version	Date	Author/Editor	Comment
3.0	9 Mar 2022	Derek Blumenthal	

From v1.1 and on all revisions made for the most current version are highlighted in yellow both in the table of contents as well as the body of the user guide. Sections that were removed completely are not indicated.

Table of Contents

Introduction

Our Global Unity technology platform provides managers with tools to help them effectively manage their employees with a convenient, centrally located database and the ability to track employee absences and expenses in real time. Employees can use Global Unity to track and submit their own absence requests, work activities and expenses.

This user guide provides an explanation of the functions of each section of Global Unity for managers.

Login

The login page is located here: https://globalunity.safeguardglobal.com
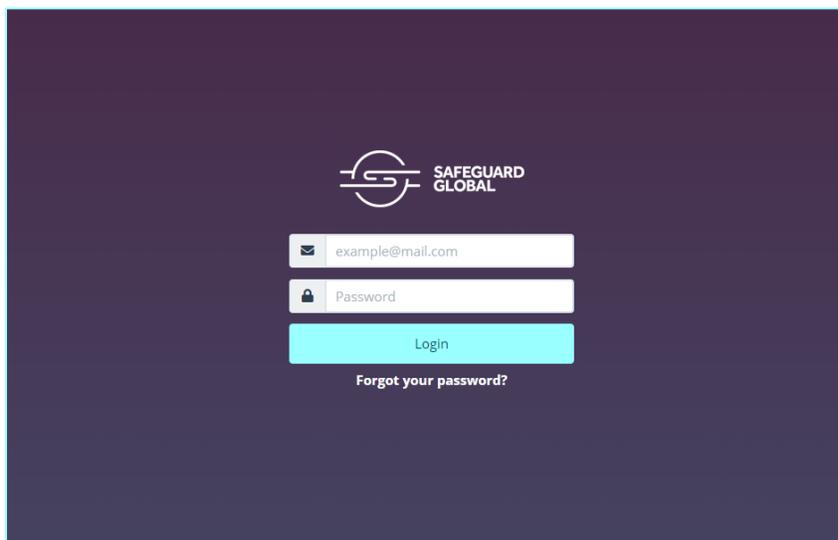
1 - Global Unity Login

Enter your username (email address) and password and click the **Login** button.

If you have need to reset your password, click the **Forgot your password?** link, enter your email address and click the **Reset your password** button. You will receive an email with instructions for creating a new password.
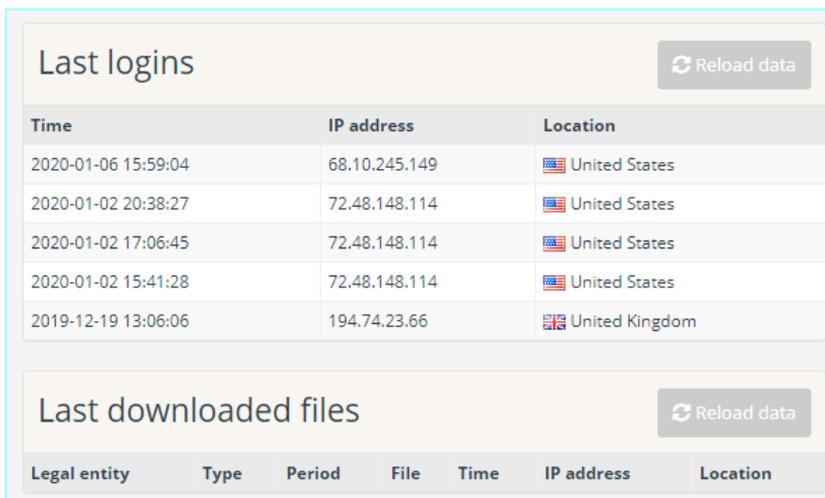
Header

2 - Global Unity Header

Once logged in, the top of every page of the tool provides several options:

- **Show/hide menu** – click this button to show or hide the menu on the left side of the page.

- **Settings** – Click to view the Settings page
- **Logout** – click this button at the top right when you are finished using the tool in order to maintain account security.

Home

3 - Global Unity Home Screen

When you first login, you will be presented with a table of data. This is for security and visibility as well as easy access to recent activity information.

- **Last logins** – A list of the times your credentials were used to login to the system including the date and time, the IP address and the location where the login took place.

Settings

4 - Global Unity Settings Screen

The Settings page allows you to configure email notifications, change the site language, and reset your password.

Notifications

Select the email notifications you would like to receive and click the Save button. Options are:

- Pending Expense
- Approved Expense
- Rejected Expense
- Pain Expense

You may also turn off all notifications by switching the toggle under the question "Would you like to continue receiving email notifications from Safeguard?"

Choose Language

Click the desired language to change the whole site's language. For GEO we have a set default of English.

Change Password

Enter your current password, then your desired new password (twice for confirmation), then click the Change button.
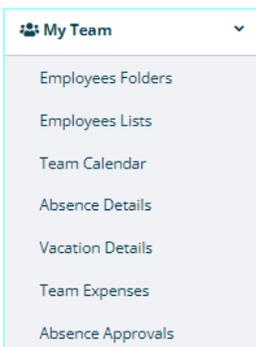
Login Validation

Switch the toggle on under **MFA Enabled?** if you are using a mobile app for multi-factor authentication. When enabled, you will be logged out and the login page will contain a QR code to be scanned authentication. You may also select to use SMS to authenticate.
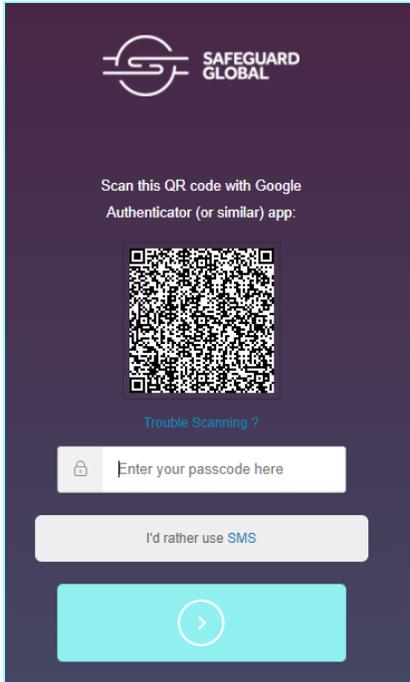
5 - Global Unity Login with Multi-Factor Authentication

My Team

6 - Global Unity Menu, My Team Section

Employees Folders

7 - Global Unity Employees Folders Screen

This function gives managers the ability to view a full or filtered list of employees and any employee data that is in the system for those employees. The full list can be downloaded by clicking the **Download as .XLSX** button. The list can also be searched using the **Search** tool at the top right. The list can also be filtered using the dropdown menu. Options are:

- Employees with active contract this month
- Employees with active contract this year
- Joiners this month
- Leavers this month
- All employees
- Employees with inactive contract

Employees Lists

8 - Global Unity Employees Lists Screen

This function gives managers the ability to view a full or filtered list of employees and any employee data that is in the system for those employees. The full list can be downloaded by clicking the **Download as .XLSX** button. The list can also be searched using the **Search** tool at the top right. The list can also be filtered using the dropdown menu. Options are:

- Employees with active contract this month
- Employees with active contract this year

- Joiners this month
- Leavers this month
- All employees (historical)
- All employees (last situation)
- Employees with inactive contract

Clicking the name of any employee in the list brings you to the employee folder for that user.

Team Calendar

9 - Global Unity Team Calendar Screen

This function provides visibility for managers to see a summary of all their employees' calendar data including employee ID, name, legal entity, and any vacation requests for the current month. Previous or next months can be viewed by clicking the **Previous** or **Next** buttons.

The calendar can be searched using the **Search** tool at the top right. The calendar can also be filtered using the dropdown menu. Options are:

- Employees for whom I am an approver
- Direct reports only
- All my team

You can view the more detailed calendar for an individual employee by clicking the **calendar** button in the desired row. Time sheets for individual employees can be viewed and edited by clicking the **pencil** button in the desired row.

HOW TO: APPROVE OR REJECT ABSENCE REQUESTS FROM THE TEAM CALENDAR

Task	Snapshot
1. Click the request icon in the desired row.	

2. Select the desired approval status for the request.	**Absence:** Sickness (full day) **Hours:** 08:00 **Requested by:** Test Worker 1234 **Requested time:** 2022-03-07 16:46:29 [See details] **Comment** [Comment] [Re-send email] [Reject] [Reject all] [Approve] [Approve all]

Absence Details

10 - Global Unity Absence Details Screen

This function displays a list of employees for which managers can then view the details of any work absences they may have had. The full list can be downloaded by clicking the **Download as .XLS** button. The list can be searched using the **Search** tool at the top right or it can be filtered using the dropdown menu. Options are:

- Employees for whom I am an approver
- Direct reports only
- All my team

For any employee in the list, clicking their name will display details of any absences they have had, organized by month and absence type.

Absence type	January	February	March	April	May	June
Paid union permits						
Own wedding						
Sickness (half day)						
Vacation (full day)			5			
Vacation (half day)						
Business trip						
Unpaid Leave						
Maternity / Paternity						
Childcare Leave						
Occasional Leave						
Others			2			
Mobile Hours worked						
Mobile Hours compensation						

11 - Global Unity Absence Details for a Selected User

Vacation Details

Employee ID	Employee Name ▲	Legal Entity Short Name	Incremental	Carry over	Waiting period	Accrued	Taken	Planned	Carry lost	Balance
0000001210	1234 Test Worker	DEMO Safeguard GEO Switzerland	0.00	-0.67	0.00	20.00	0.00	-6.00	0.00	13.33
SFGEO036	ANSTETT , MABEL	DEMO Safeguard GEO Switzerland	0.00	63.75	0.00	6.25	0.00	0.00	0.00	70.00
SFGEO009	AU , CAMÉLIA	DEMO Safeguard GEO Switzerland	0.00	75.00	0.00	6.25	0.00	0.00	0.00	81.25
SFGEO061	BATTAGLIA , MARGAUX	DEMO Safeguard GEO Switzerland	0.00	75.00	0.00	6.25	0.00	0.00	0.00	81.25
SFGEO048	BIECHELIN , KOMAL	DEMO Safeguard GEO Switzerland	0.00	68.75	0.00	6.25	0.00	0.00	0.00	75.00
SFGEO060	BILLOT , DANIELA	DEMO Safeguard GEO Switzerland	0.00	68.75	0.00	6.25	0.00	0.00	0.00	75.00

12 - Global Unity Vacation Details Screen

This function displays a list of employees for which managers can then view their vacation data. The full list can be downloaded by clicking the **Download as .XLS** button. The list can be searched using the **Search** tool at the top right or it can be filtered using the dropdown menu. Options are:

- Employees for whom I am an approver
- Direct reports only
- All my team

For any employee in the list, the following is displayed:

- number of vacation days carried over from previous years
- number of vacation days accrued
- number of days taken

- number of days planned
- number of days lost
- balance

Clicking the name of any employee in the list will display more specific vacation details for that employee.

Absence Approvals

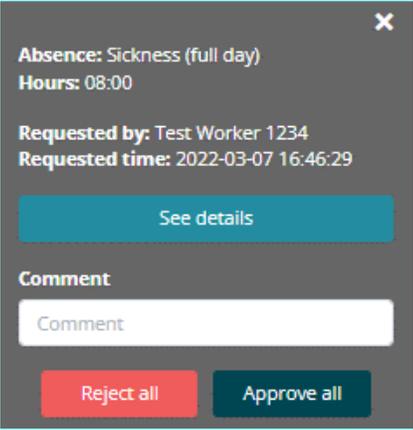*13 - Global Unity Absence Approvals Screen*

This function gives managers visibility of any submitted absence requests that they have yet to approve or reject and allows them to quickly change the approval status of these open requests.

The full list can be downloaded by clicking the **Download as .XLS** button. The list can be searched using the **Search** tool at the top right or it can be filtered using the dropdown menu. Options are:
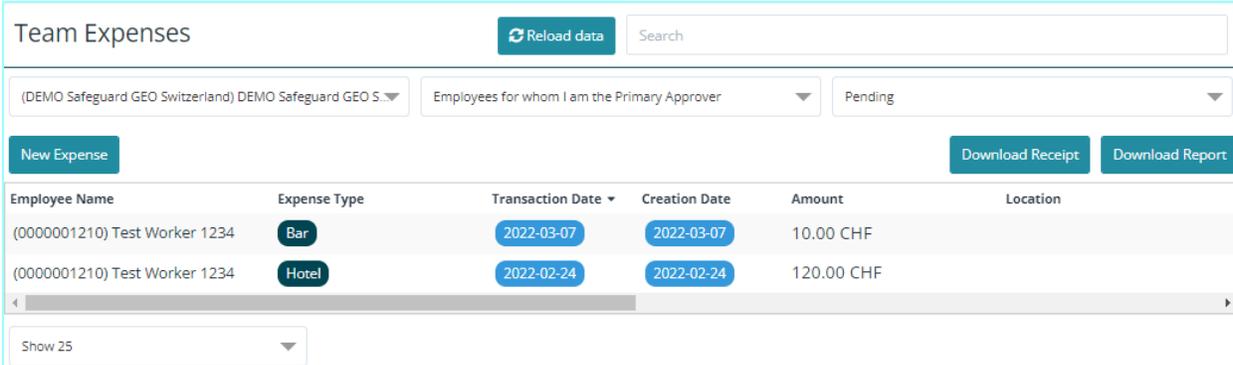
- Employees for whom I am an approver
- Direct reports only
- All my team

HOW TO: APPROVE OR REJECT ABSENCE REQUESTS FROM PENDING APPROVALS

Task	Snapshot
1. Click the **request** icon.	

2. In the resulting menu, click **Reject All** or **Approve All**.	
3. Alternatively, you can add a comment or click **See Details** to see more about the request.	
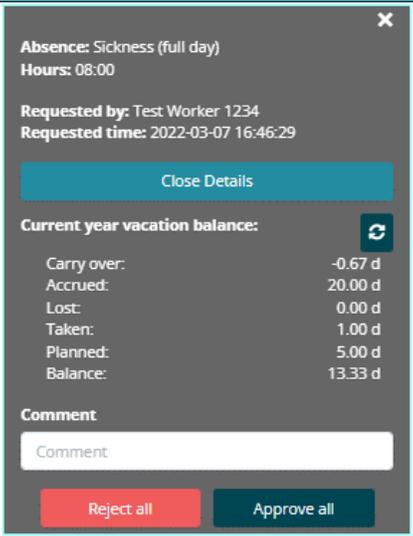
Team Expenses

14 - Global Unity Team Expenses Screen

This function displays all expense requests submitted by your team for your approval. The list can be filtered using the three dropdown menus at the top. The options in the first menu relate to the legal entity. The second dropdown filters for different groups of employees:

- All my team

- Employees for whom I am the Primary Approver
- Employees for whom I am the Delegated Approver

The options in the third menu relate to request status:

- All statuses
- Pending
- Approved
- Rejected
- Paid

The list can be ordered by either ascending or descending Transaction or Creation dates by clicking the associated header. You can also search for specific expense requests using the **Search** field at the top right.

Receipts from a desired date or block of dates can be downloaded by clicking the **Download Receipt** button and specifying the dates. Similarly, an expense report can be downloaded for a desired date or block of dates by clicking the **Download Report** button and specifying the dates.

For each request in the list, you can see the username of the person it applies to, the date it was submitted, the type of expense, the value, and the approval status. There are also several buttons in each row.


15 – Global Unity Team Expenses Row Buttons

- **Image button** – click this button to view the receipt image attached to the request (if applicable).
- **Edit button** – click this button to change any details of the request and resubmit. Only applies to requests that are not already approved.
- **Trash button** – click this button to delete the request.
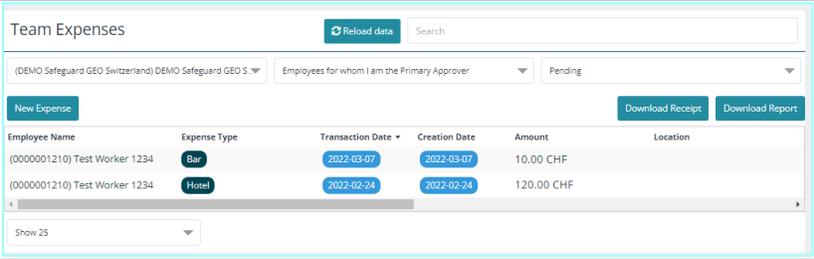
HOW TO: APPROVE OR REJECT EXPENSE REQUESTS

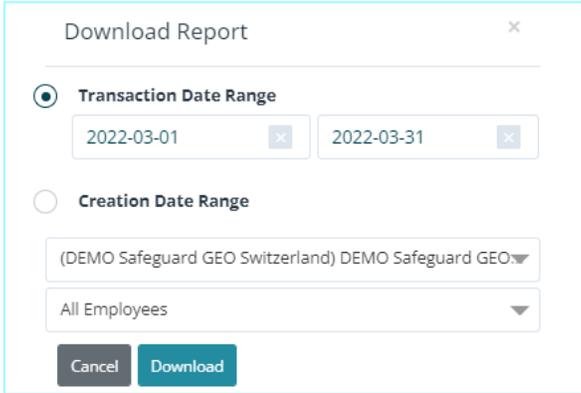| Task	Snapshot
1. Navigate to the desired row and click the status label for the desired Pending request.	Approved Pending Pending
2. For Pending requests, you may select Approve or Reject.	Pending Approve Reject

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3.	For Approved requests, you can change the status by selecting Reject.	Approved Reject
4.	For Rejected requests, you can change the status by selecting Approve.	Approve
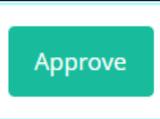
The status change will be visible to the requestor in their My Expenses section.

HOW TO: DOWNLOAD AN EXPENSE REPORT
An expense report can be downloaded for a desired date or block of dates.

Task	Snapshot
1. On the Team Expenses page, click the **Download Report** button.	
2. Select either **Transaction Date Range** or **Creation Date Range**. Enter the desired dates. If you want a report for just one day, enter the same date in both fields.	
3. Select the desired legal entity.	
4. Select the desired employee from the list or select All employees.	
5. Click **Download**.	