The NCSU Leave System was written to enable all campus users the ability to track their leave by giving them access to a single leave application. In the past, the campus community has used a number of differing methods to track and report their leave including using spreadsheets, a DOS program written by the budget office, paper worksheets and independently written leave applications. This new web based application will give the campus one interface, which will be platform independent and schedule independent since it will be available to any web browser at any time of the day.

This User’s Guide will use snapshots of the web application pages to visually “walk through” the application.

The application breaks down into three security levels – Employee, Supervisor and Administrator. All employees who are entered into the leave system will see the Employee section and all items in this section will apply to their leave and no one else’s. The Supervisor section is the next section and will ONLY appear for individuals who have been assigned as Supervisors. This section gives the supervisor the options of approving leave for their employees or printing out individual leave forms for their employees. The next section is for the Leave Coordinators and will ONLY show for people who have been entered into the Leave system as Administrators for certain Departments. Leave Coordinators are allowed to enter or edit employees, reassign supervisors en masse, post leave transactions, and print any of their employees leave reports/forms.

The example used in this user’s guide will be for someone who has all levels of access for ease of writing this manual only.

All employees will have the option of returning to the main menu by clicking on the main menu link at the bottom of each page and all employees will be able to access this User’s guide by clicking on the Help Link at the bottom of each page.

If you need help with the application, please call ACS Help desk @ 513-1178
Main menu – Note the top section is for all employees that are in the leave system and both the Supervisor and Administrator sections are clearly labeled. The Supervisor & Administrator sections will show for ONLY those employees who have been granted access to these sections.

Also note that if an employee has not taken the Floating Holiday a “reminder” will show up on the main menu until the employee requests a leave record with a type of Floating Holiday. Floating Holiday leave must be taken all at the same time and is equivalent to one workday or 8 hours which ever is less.
Submit Request – When an employee clicks on the Submit request link, they’ll get the web page above. Note that the Employee’s name and supervisor are populated and are not editable. Click on one of the radio buttons to choose the Type of leave to be taken. The application only maintains balances for Annual, Sick and Comp. All leave types will be shown in the Transaction Listing report and the balances for Adverse Weather, Community Service, Military and Civil will be displayed at the bottom of the monthly breakdown report. The time must be entered in the format 00:00 and is required for both the beginning and ending times. The default beginning time is 08:00 and the default ending time is 05:00. The meridians are also required and defaults are preselected as am for beginning time and pm for ending time. The dates may either be entered manually in the format mm/dd/yyyy, mm/dd/yyyy or you may use the calendar icon to the left of the date boxes to select the dates you need. The icon is used separately for each date. The total amount of leave requested should be entered next and is required. The amount of leave requested for either annual or sick leave must be entered in 15-minute increments. The application will check for these conditions and issue errors as warranted. The remarks text box is optional except for the leave type of “Other” but is useful when viewing the reports so it’s
suggested that you use it for clarity. The application will also verify that the leave you’ve entered will NOT overlap with another leave record in the system for you. This includes comp time earned records as well as all leave taken records. The system will also verify that the ending date is after the beginning date.

When selecting Community Service leave for Mentoring, the system will not allow you to take more than 36 hrs per year or more than 1 hour per week (pro-rated for reduced FTE’s).

When selecting Community Service leave for Volunteering, the system will not allow you to take more than 24 hours per year (pro-rated for reduced FTE’s).

If all of these conditions have been met, leave will be submitted and entered into the leave database. The following screen will display and the supervisor will be sent an email requesting approval of the leave request. An example follows.

**Successful Submittal** – An example of a successful leave record entry.
Email to Supervisor – An example of an email request sent to a supervisor requesting approval for the leave submitted.

Once the Supervisor approves or refuses the leave request, the employee will receive an email confirmation back. This is helpful for the employee to track approved leave.
Approved Leave request example email – this is the format of the email that is automatically generated when the supervisor approves the leave request.

From: <tanja_davidson@ncsu.edu>
To: <tanjadavidson@ncsu.edu>
Date: Friday, October 27, 2000 3:21 PM
Subject: Your leave request has been approved by Tanja Davidson

Tanja,

Your leave request has been approved for Jan 10 2000 7:30AM thru Jan 10 2000 11:30AM.

Enjoy your time off and remember that all projects are still due on time.

Tanja Davidson
tanja_davidson@ncsu.edu
Leave Refused Email example – This is an example of the email automatically generated and sent to the employee when the supervisor refuses a leave request.
Edit Requests – To edit any of the leave requests, click on Edit Requests from the main menu. The above screen will display. The user must highlight the record they would like to work with and then click on either the edit, delete or Notify supervisor buttons to proceed. Edit will give you basically the same screens as the submit request process. The only difference between the two functions is that the edit request will populate with the information that was entered for that record. All of the error checks remain the same… ending dates must come after beginning dates, no records can be overlapped, and the formats of the time & date fields are the same as for the submit process. To delete a request, a screen will be presented asking the user if they are sure they want to delete the request. If “NO” is selected, the user will be taken back to the edit requests screen. If “Yes” is selected and the supervisor hasn’t yet approved the request, the leave record will be deleted (this is a true delete) and the application returns to the Edit Requests screen with the record that was just deleted. If the supervisor has already approved the leave request, then an OFFSET record will be created for the employee and the supervisor will approve this OFFSET to cause the two records to cancel each other out or the supervisor will refuse the OFFSET which will leave the record unaffected because the refusal will delete the OFFSET request.
If the employee would like to re-notify the supervisor to get approval for a leave request, they should highlight that request and click on renotify. This process basically just submits the same email message the supervisor received earlier. This is a good way to remind the supervisor of the request.

Delete Request Example – Clicking “Yes” as above will permanently remove it if not already approved by the supervisor.
Post Comp Time – When selecting “Post Comp Time Earned”, the screen above displays and the user is able to enter, edit and delete any comp time earned. The comp time earned submit form is much like the submit leave and edit leave forms except that the leave type is preset so you don’t need to choose a leave type. Also the Reason for Overtime (equivalent to the remarks box) is required. The user will receive a display screen after a successful entry since you’ll be brought back to the screen above and any comp time entered will show in the listing. The supervisor will get the notice about the comp time earned record upon successful entry. Edit
and Delete perform exactly as with the submit/edit processes.

**Notification of Comp Time Earned** – Example email sent to the supervisor when you enter comp time earned.
Print Leave Forms – “Print Leave Forms” from the main menu, will display the screen above. If the user has no leave requests in the database, a message will appear in the box indicating that fact. If not, a listing of all the employee’s leave requests (for leave taken not Earned) that the employee can select from to display the leave form will be displayed. Highlight the request to be printed, click the button. A screen will display of the NCSU Leave form populated with the information from the employee’s leave record.

To Print press the browser’s print button to print the displayed page.
Adverse Weather is posted in much the same way as Comp Time Earned. The only exception is that the employee enters both time taken and time made up on this one screen. The time Taken goes in as a positive amount and then the time made up subtracts from that amount. The employee will not be allowed to make up more time than taken.
Example of the screen for submitting Adverse Weather Taken and Made Up. Comments are required. Supervisor approval is still needed. Any edits will be done from the Adverse Weather menu option and not in the Edit Leave option.
Displayed Leave Form to be printed – An example of a leave form to be printed by the browser’s print function.

The Reports are located on the right hand Employee section of the main menu. You’ll notice that all reports are all this side. To run any of the reports – Employee Information, Transaction Listing, Forecasted Leave, Leave Table or Monthly breakdown – click on that report’s link. After a few seconds of processing the report will be displayed to the Screen.

A Toggle message at the bottom of the screen allows the user to toggle between two years of reports. Please note if the user has only one year of data, this message is not displayed.
One major difference between this application and the old DOS application is that the DOS application only applied leave amounts after the request had been approved by the supervisor. The new application updates all amounts regardless of whether they have been approved. The application also does not try to update the balance as the user progresses through the leave requests, it instead will compute the balances each time the user request a report/listing. If the program maintains the beginning balances, and then computes all entries and sum it up each time a request is generated for updated information. This eliminates problems with adding/editing or deleting leave records at any time during the year.

Examples of each type of report/listing follows:

**Employee Information**

![Employee leave system screenshot](image)

**Employee Information for 2002**

- **Name**: Tanja Davidson  
  **Userid**: tldavids
- **Email**: tanja_davidson@ncsu.edu  
  **Supervisor**: tldavids
- **Accrual Comp. Date**: 06/01/1996
- **FTE**: 1.00  
  **Active**: Yes
- **Employee Classification**: SPA
- **Dept**: Administrative Computing Servi (465001)

- **Annual**: 240 hrs 0 mins  
  **Sick**: 833 hrs 20 mins  
  **Comp**: 4 hrs 30 mins
- **Last Used**: 02/14/2002  
  **Last Processed**: 12/31/2001

*The following balances reflect requests which are pending Supervisory approval.*

- **Annual**: 216 hrs 0 mins  
  **Sick**: 820 hrs 20 mins  
  **Comp**: 4 hrs 27 mins

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**Main Menu**  
**Help**

Last updated: June 8, 2001
<ncr_tech@ncsu.edu>
@Copyright 2001
Notice that this report shows both pending amounts and approved amounts. All pending amounts will show in red in parenthesis and a notice that the balances reflect pending amounts will show at the bottom of the screen as seen above.

If the “true” balance is 94 hrs but the balance will be 88 hrs & 15 minutes after the supervisor approves the pending requests.
Monthly Breakdown Report

Note the pending requests showing in the report. These amounts will be deducted from the leave balance after the supervisor’s approval.

<table>
<thead>
<tr>
<th>Month</th>
<th>Annual Earned</th>
<th>Annual Used</th>
<th>Sick Earned</th>
<th>Sick Used</th>
<th>Comp Earned</th>
<th>Comp Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>240.00</td>
<td>0.00</td>
<td>0.00</td>
<td>833.20</td>
<td>4.30</td>
<td>0.00</td>
</tr>
<tr>
<td>Feb</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Mar</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Apr</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>May</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>June</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>July</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Aug</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Sept</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Oct</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Nov</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Dec</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals:</td>
<td>240.00</td>
<td>0.00</td>
<td>833.20</td>
<td>0.00</td>
<td>4.30</td>
<td>0.00</td>
</tr>
<tr>
<td>Balances:</td>
<td>240.00</td>
<td>0.00</td>
<td>833.20</td>
<td>820.20</td>
<td>4.30</td>
<td>4.27</td>
</tr>
</tbody>
</table>

* Balances shown in parentheses reflect leave requests which are pending Supervisory approval.
Note that at the bottom of the Monthly Breakdown report you’ll find the balances for Adverse Weather Taken, Adverse Weather Made Up, Community Service Mentor & Volunteer, Military and Civil. Again both approved and unapproved leave balances are reported.

<table>
<thead>
<tr>
<th>Bal Fwd:</th>
<th>240:00</th>
<th>833:20</th>
<th>4:30</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>February</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>March</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>April</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>May</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>June</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>July</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>August</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>September</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>October</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>November</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td>December</td>
<td>0:00</td>
<td>0:00</td>
<td>0:00</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>240:00</td>
<td>833:20</td>
<td>4:30</td>
</tr>
<tr>
<td><strong>Balances:</strong></td>
<td>240:00</td>
<td>833:20</td>
<td>4:30</td>
</tr>
</tbody>
</table>

*Balances shown in parentheses reflect leave requests which are pending Supervisory approval.

**Adverse Weather Taken:** 0:00 [2:35] **Adverse Weather Made Up:** 8:00 [3:00]

**Community Service Mentor:** 1:00 **Community Service Volunteer:** 5:00

**Military Leave:** 0:00 **Civil Leave:** 0:00 [5:15]

***Floating Holiday Status: NOT TAKEN***
### Transaction Listing

Pending requests, they will show up in red with a note at the bottom of the screen just as with the other reports. The default sort order is by Date Taken but the employee is allowed to change the sort order by between date submitted and date taken by clicking on the column heading for either column.

<table>
<thead>
<tr>
<th>Date Processed</th>
<th>Dates Taken</th>
<th>Leave Type</th>
<th>Amount Requested</th>
<th>Remarks</th>
</tr>
</thead>
</table>
| Balance Forward | 01/10/2002 08:00 AM  
01/10/2002 05:00 PM | Annual | 240 hrs 0 mins |          |
| Balance Forward | 01/11/2002 08:00 AM  
01/11/2002 05:00 PM | Sick | 333 hrs 20 mins |          |
| Balance Forward | 02/07/2002 08:00 AM  
02/07/2002 05:00 PM | Comp | 4 hrs 30 mins | None. |
| Community Service Mentor | 01/10/2002 08:00 AM  
01/10/2002 05:00 PM | Adverse Weather | - 1 hrs 0 mins | None. |
| 02/07/2002 08:00 AM  
02/07/2002 05:00 PM | Civil | - 5 hrs 15 mins | because2 |
| 02/07/2002 08:00 AM  
02/07/2002 05:00 PM | Annual | - 6 hrs 0 mins | test1 |
| 02/07/2002 08:00 AM  
02/07/2002 05:00 PM | Annual | - 5 hrs 0 mins | jkl |
| 02/07/2002 08:00 AM  
02/07/2002 05:00 PM | Annual | - 8 hrs 0 mins | None. |
### Annual Leave Earning Table

<table>
<thead>
<tr>
<th>No. of Years</th>
<th>Leave Earned each Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 2</td>
<td>7 hrs 50 mins</td>
</tr>
<tr>
<td>2 but &lt; 5</td>
<td>9 hrs 10 mins</td>
</tr>
<tr>
<td>5 but &lt; 10</td>
<td>11 hrs 10 mins</td>
</tr>
<tr>
<td>10 but &lt; 15</td>
<td>13 hrs 10 mins</td>
</tr>
<tr>
<td>15 but &lt; 20</td>
<td>15 hrs 10 mins</td>
</tr>
<tr>
<td>20+</td>
<td>17 hrs 10 mins</td>
</tr>
</tbody>
</table>

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**Leave Table Breakdown**

This is the Leave Table Report. This is simply a display of the leave table used to determine how much leave to accrue for SPA employees.