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.
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.

From: <tanja_davidson@ncsu.edu>
To: <tanja_davidson@ncsu.edu>
Date: Friday, October 27, 2000 3:22PM
Subject: Leave Refused by Tanja Davidson

Tanja,

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

You are welcome to come by my office and discuss my reasons for denying your leave request.

Tanja Davidson
tanja_davidson@ncsu.edu
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 progress 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 Information for 2002

Name: Tanja Davidson  Userid: tjdavids
Email: tanja_davidson@ncsu.edu  Supervisor: tjdavids
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

Main Menu  Help!
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.
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.
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>
<tbody>
<tr>
<td>Balance Forward</td>
<td>01/10/2002 08:00 AM 01/10/2002 05:00 PM</td>
<td>Annual</td>
<td>240 hrs 0 mins</td>
<td></td>
</tr>
<tr>
<td>Balance Forward</td>
<td>01/14/2002 08:00 AM 01/14/2002 05:00 PM</td>
<td>Sick</td>
<td>333 hrs 20 mins</td>
<td></td>
</tr>
<tr>
<td>Balance Forward</td>
<td>02/07/2002 08:00 AM 02/07/2002 05:00 PM</td>
<td>Comp</td>
<td>4 hrs 30 mins</td>
<td></td>
</tr>
<tr>
<td>Balance Forward</td>
<td>02/07/2002 08:00 AM 02/07/2002 05:00 PM</td>
<td>Community Service Mentor</td>
<td>- 1 hrs 0 min</td>
<td>None, because</td>
</tr>
<tr>
<td>Balance Forward</td>
<td>02/07/2002 08:00 AM 02/07/2002 05:00 PM</td>
<td>Adverse Weather</td>
<td>- 8 hrs 0 min</td>
<td></td>
</tr>
<tr>
<td>Balance Forward</td>
<td>01/15/2002 08:00 AM 01/15/2002 05:00 PM</td>
<td>Civil</td>
<td>- 5 hrs 15 mins</td>
<td></td>
</tr>
<tr>
<td>Balance Forward</td>
<td>02/02/2002 08:00 AM 02/02/2002 05:00 PM</td>
<td>Annual</td>
<td>- 6 hrs 0 min</td>
<td>test1</td>
</tr>
<tr>
<td>Balance Forward</td>
<td>02/02/2002 08:00 AM 02/02/2002 05:00 PM</td>
<td>Annual</td>
<td>- 5 hrs 0 min</td>
<td>jkkl</td>
</tr>
<tr>
<td>Balance Forward</td>
<td>02/02/2002 08:00 AM 02/02/2002 05:00 PM</td>
<td>Annual</td>
<td>- 8 hrs 0 min</td>
<td>None</td>
</tr>
</tbody>
</table>
# 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>

## 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.
Supervisor Options

The Supervisor has two options which can be performed in addition to the Employee User section. These options are Approve requests and print forms. This section will apply to the Employees who are currently assigned to this supervisor. If all employees are assigned to other supervisors at any point, then you will no longer have access to the Supervisor Options section. This section only appears if you have at least one employee assigned to you.

In order to approve or refuse leave requests submitted by employees you may either click on the web address that was provided in your email notification(s) or you may login to the Leave system directly and then click on the Approve Requests link. If there are no requests pending approval, the screen below will display.
If there are pending requests, a screen like the one shown below will display. Highlight the request to be approved and click on approve to approve and send the employee an email notification automatically or click on refuse. NOTE: If you choose to refuse the leave request, the request will be permanently deleted from the database and an email notification of the refusal will be sent to the employee automatically. An example via screen shots follows:

**Pending Leave Request** – The screen above, reflects leave requests which are pending approval. Highlight and click on “Process Request”, the leave request is then displayed along with the options to approve or refuse the request. Just click on the appropriate radio button and click “Submit”. The user is taken back to the Supervisor Approval Screen which shows any requests pending approval and an email notification like the one below is sent to the employee who initiated the request.
Leave request waiting Supervisor approval. Notice that this one is going to be Approved.
Approved Leave - Email notification to Employee that we’ve just approved their leave request.

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From: <tanja_davidson@ncsu.edu>
To: <tanja_davidson@ncsu.edu>
Date: Monday, October 30, 2000 3:16PM
Subject: Your leave request has been approved by Tanja Davidson

Tanja,

Your leave request has been approved for Oct 30 2000 - 6:00AM thru Oct 30 2000 - 6:00PM.

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

Tanja Davidson
<tanja_davidson@ncsu.edu>
Refused Leave – Employee notification of leave request that was denied by the Supervisor.

To print employee reports, click on the “Employee Reports” link. The screen below will display.
Screen shot for selecting Employees and the reports to print for them. Click on “Expand to show all Employees” in order to see the employees who report to your direct reports.
Print Employee Forms – Choose the employee whose forms are to be printed. Note that it is necessary to select each leave request to be printed separately. Then select Leave Forms as the type of report to display and click on “Display the Report”. This will show only your direct reports. Click the Expand to show all Employees to go down another level and show the employees of your direct reports.
Select the individual leave request that needs to display to the screen, this way you can print it from the browser. Once the request has been highlighted, hit the “Choose a form to print” button.
Application for Leave

Employee: Janet Broughton (jlbrough)  Date: 2/14/20
Type of Leave Requested: Vacation
Leave Beginning Dec 1 2002 12:00AM thru Dec 1 2002 12:00AM
Total Amount of Leave Requested: 8 Hour(s) 0 Minutes**

Employee Signature ___________________________ Date:

Approved ___________________________ Date: 

Supervisor

Approved ___________________________ Date: 

Dept. Head

Remarks and/or Explanation: SICK TIME EARNED: 12/01/2001

Provide one copy for the employee and retain one copy for the department files. DO NOT send this form to the Division of Personnel Services.

ALL LEAVE IS SUBJECT TO SUPERVISORY APPROVAL

* This space may be used for recording LWOP.

The screen above is displayed and the print feature of the browser can be used to send the form to the printer.
Administrator Options

The Leave Coordinator is allowed to modify the employee information, modify employee leave transactions, print employee leave reports, and reassign supervisors for any employee within the DEPARTMENT range assigned to the Leave Coordinator within the Leave_admin database.

From the main menu the Leave Coordinator options will show up at the bottom of the screen.
Add an employee named Good Test to our list of employees. Notice that in this screen display, his name doesn’t show in the listing.
Enter his PeopleSoft Employee ID, which is 123456789, click on the Verify Employee Exists button. If the employee is not found an error message will display, if the employee is found, the following screen will display.
This is a screen allows the user a chance to review the employee’s information. Please note that this employee must have a home Department that exists in your assigned Department’s range or you’ll get an error message that you can’t add them. If the employee is correct for the Department, click on the submit button.
Notice that most of the information is populated automatically for you. **PLEASE VERIFY** this information for EPA and SPA employees. Information is populated from Peoplesoft and all data must be correct. The information on this screen will determine leave accrual dates and amounts.

Please note that you are allowed to edit these fields at any time but comments will be required. A nightly program will run which will update the non-editable fields automatically for you from PSHR in order to keep the database synced with PSHR. Also note that a full audit trail is running behind the scenes so any action you make in the administrator options area can be traced back to you. So make the comments meaningful.
If the employee is an EPA employee, it will be necessary to enter EPA annual and sick accrual amounts. The EPA annual leave accrual amount defaults to 16 hours earned per month.
Mr. Good Test has been added and can be seen in the employee listing.

The Supervisors should be entered before the employee. This is not a must, however it helps when the user enters an employee and go to select the supervisor that the supervisor is in the list to select from. Employees will not be allowed access to the system without having a supervisor assigned to them.

The Delete option will mark the employee for deletion from the table. An opportunity to back out of this option is given.

The Transfer option allows an easy way to transfer employees to another DEPARTMENT. This is useful for departments sharing employees. This field will NOT be overwritten at night.

The Employee Reports are the same exact format as for the supervisor.
Reassign Supervisor Option allows the capability to reassign a supervisor’s employees to another supervisor. Choose the supervisor to be replaced and then choose the new supervisor. These are built from the employees in the employee table who are in the employee’s assigned Department range(s). Click the submit button.
A chance to back out of the reassignment is given.
Now notice that the Supervisor Options section is missing for tldavids.
Leave Coordinators are allowed to add/edit/delete leave transactions for employees within their assigned Department range(s). Please note the system keeps an audit trail.

When the user selects Post Transactions, the above screen will display. Choose the employee; click on the button.
Leave Coordinators can increase or decrease the employee’s leave. The user will input the data as they did in the Employee section. The only exception is that comments are required! An audit trail is also occurring behind the scenes.

Now notice that our newly created leave transaction shows up for Mr. Good Test. Notice that the top of the screen clearly tells us which employee we are working with at the time.