

# Leave Management Guide

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*new world ERP – Human Resources: Leave Management*



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# Contents

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FMLA .....	1
Security .....	1
Setup .....	1
FMLA Requests.....	4
Time Entry .....	8
FMLA Hours Update from Payroll .....	9
Reports.....	11
Time Off Requests.....	12
Security .....	12
Setup .....	13
Create Roles .....	13
Approval Manager .....	14
Select the Approval Processes and Roles.....	16
Assign Accrual Plan Profiles to Time Off Request .....	17
Set Counters for Time Off .....	18
Request Time Off .....	18
Approve Time Off Requests .....	20

## INTRODUCTION

Welcome to the new world ERP Leave Management Guide. Leave Management licensing includes two modules that are used to track time off work:

- FMLA (The Family and Medical Leave Act)
- Time Off Request

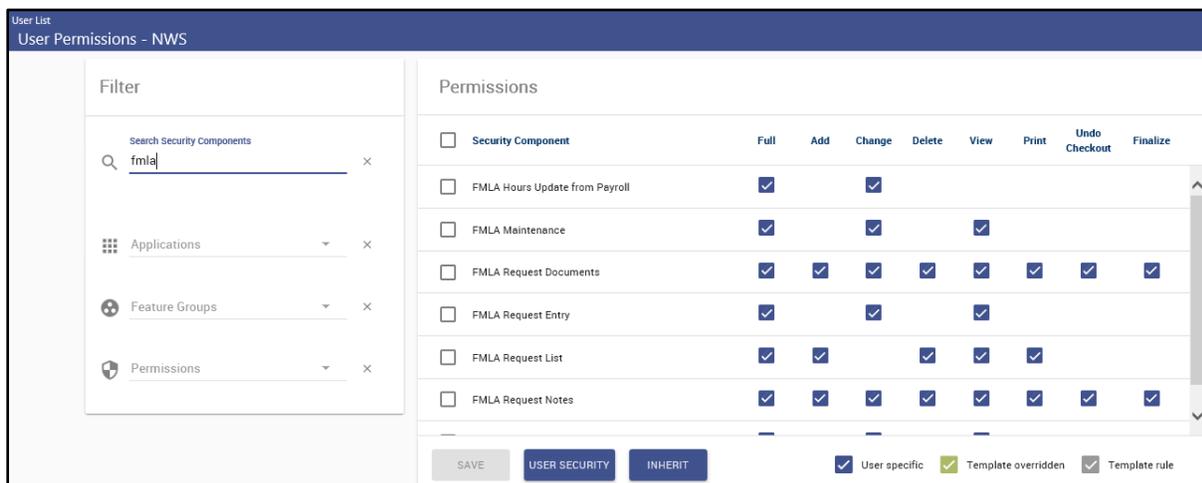
This document is available in Microsoft Word format to allow for customization to your organization's needs and procedures.

## FMLA

## SECURITY

*Maintenance > New World ERP Suite > Security > Users*

In User Permissions search for FMLA components and verify that FMLA user have the appropriate access.



The screenshot shows the 'User Permissions - NWS' interface. On the left, there is a 'Filter' section with a search box containing 'fmla' and three dropdown menus for 'Applications', 'Feature Groups', and 'Permissions'. The main area is titled 'Permissions' and contains a table with columns for 'Security Component', 'Full', 'Add', 'Change', 'Delete', 'View', 'Print', 'Undo Checkout', and 'Finalize'. The table lists several FMLA components with checkboxes indicating their status. At the bottom, there are buttons for 'SAVE', 'USER SECURITY', and 'INHERIT', along with checkboxes for 'User specific', 'Template overridden', and 'Template rule'.

Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
<input type="checkbox"/> Security Component								
<input type="checkbox"/> FMLA Hours Update from Payroll	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					
<input type="checkbox"/> FMLA Maintenance	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
<input type="checkbox"/> FMLA Request Documents	<input checked="" type="checkbox"/>							
<input type="checkbox"/> FMLA Request Entry	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
<input type="checkbox"/> FMLA Request List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> FMLA Request Notes	<input checked="" type="checkbox"/>							

## SETUP

*Maintenance > Human Resources > FMLA Settings*

Use the FMLA Settings page to define employee FMLA entitlement and eligibility rules per federal law.

FMLA Settings

FMLA Settings

Annual Entitlement (Weeks)	12.00
Military Entitlement (Weeks)	26.00
Minimum Service (Weeks)	52.00
Minimum Work Hours	1,250.00
FMLA Calendar	Fixed Calendar <input type="checkbox"/>
Begin Month / Day	1 / 1

Field Name	Field Description
<i>Annual Entitlement (Weeks)</i>	Number of weeks of leave permitted per year. The entry may contain two decimal places.
<i>Military Entitlement (Weeks)</i>	Used in conjunction with current entitlement, additional entitlement extended for military leave.
<i>Minimum Service (Weeks)</i>	Minimum number of weeks an employee must have worked to be eligible for FMLA. The weeks worked do not have to be consecutive. The entry may contain two decimal places.
<i>Minimum Work Hours</i>	To be eligible for FMLA, minimum number of hours an employee must have worked in the 12 months before the leave begins. The entry may contain two decimal places.

Field Name	Field Description
<i>FMLA Calendar</i>	<p>Type of calendar to be used for FMLA: <b>Fixed, Roll-forward</b> or <b>Roll-backward</b>.</p> <p>A fixed calendar is a 12-month year with a specific starting date. Employees receive the annual entitlement, minus FMLA-protected leave taken in the current, fixed calendar year. Every employee follows this schedule. An example of a schedule may be 07.01 to 06.30.</p> <p>A roll-forward calendar begins the year an employee takes FMLA and ends 12 months later. It is specific to each employee. Employees receive the annual entitlement during the year beginning on the first date FMLA leave is taken; the next 12-month period does not begin until the first time FMLA leave is taken after completion of the previous 12-month period. Selecting this option disables the <b>Begin Month/Day</b> field.</p> <p>A roll-backward calendar counts the FMLA year backwards from the time an employee takes FMLA leave. It is specific to each employee. Each time an employee takes FMLA leave, the remaining leave entitlement equals the balance of the annual entitlement weeks not used during the immediately preceding 12 months. Selecting this option disables the <b>Begin Month/Day</b> field.</p>
<i>Begin Month/Day</i>	<p>Enabled and required for a fixed FMLA calendar, identifies the first month and day of the calendar year. These fields are disabled for roll-forward and roll-backward calendars.</p>

# FMLA REQUESTS

*Human Resources > FMLA > FMLA Request List*

The request list shows all requests that have been entered. Here you can search to find the request you are looking for or add a new request to the system.

### FMLA Request List

**FMLA Requests**

Employee  Benefit Group   
Leave Status  Department   
Leave Type

**Search** **Reset**

Request Number	Status	Employee Number	Employee Name	Department	Benefit Group
----------------	--------	-----------------	---------------	------------	---------------

 **New**  **Print**  **Options**

## *FMLA Request List*

1. To add a new request, click **New** at the bottom left hand of the screen to open the request template.

FMLA Request List  
**FMLA Request Entry**

**FMLA Request** | Time Entry

---

Request Number: 0000-00000      Employee:

Leave Status	<input type="text" value="Open"/> ▼	Employee	<input type="text"/>
Request Date	<input type="text"/> 📅	Eligibility Sent Date	<input type="text"/> 📅
Begin Date	<input type="text"/> 📅	Physician Due Date	<input type="text"/> 📅
End Date	<input type="text"/> 📅	Physician Received Date	<input type="text"/> 📅
Leave Type	<input type="text"/> ▼	Designation Date	<input type="text"/> 📅
Leave Reason	<input type="text"/> ▼		
Relationship	<input type="text"/> ▼		
Family Member	<input type="text"/>		

Comments

Status History

Use the **FMLA Request** tab to record the name of the employee requesting leave, the leave status and type, leave reason, request date, leave duration, key notifications and dates and other data pertaining to the request.

Field Name	Field Description
<i>Leave Status</i>	<p>Required. Identifies the status of the leave as <b>Open</b>, <b>Approved</b>, <b>Completed</b>, <b>Canceled</b> or <b>Denied</b>. On a new request, the default selection is <b>Open</b>. The Approved selection is available for open or denied requests only. Completed is available for approved requests only. Denied is available for open and approved requests only. Denying a request disables the <b>Time Entry</b> tab.</p> <p>Approving a request locks down the <i>Begin Date</i> field, since changing this date may affect the employee's leave eligibility. Once the leave request is approved, the <i>Status History</i> will display at the bottom of the page, and the <b>Time Entry</b> tab will be enabled for you to record the days and times of the leave.</p> <p>When an employee on leave returns to work, change the <i>Leave Status</i> to <b>Completed</b>. All entries except <i>Comments</i> will be locked down. The <b>Time Entry</b> tab also will become display-only.</p> <p>Canceled means the request no longer is needed. History will show the request was made but canceled. You may delete a canceled request.</p> <p>You may not delete an approved request that has time entered against it.</p>
<i>Request Date</i>	Required. Date the employee requested leave.
<i>Begin Date</i>	Required. Employee's first day on leave. If the employee is going on a continuous leave, the date will be the same as the employee's employment effective date in Workforce Administration.
<i>End Date</i>	Required. Employee's last day on leave, not the day the employee returns to work.
<i>Leave Type</i>	<p>Required. Identifies how the leave will be taken. Available selections come from validation set 477, FMLA Leave Type. <b>Continuous</b> refers to leave that is not broken by periods of work; it is taken continuously over a period of days or weeks. <b>Intermittent</b> refers to the use of periodic days or hours, while the employee continues to work.</p> <p>If you need to add a reason to the validation set, hold down the <b>&lt;Ctrl&gt;</b> key and click in the field. The validation set 477 popup will open.</p>

Field Name	Field Description
<i>Employee</i>	Required. Employee requesting the leave. The drop-down contains the names of employees from the departments the user has access to.
<i>Leave Reason</i>	Required. Reason the employee is going on leave. Available selections come from validation 476, FMLA Leave Reason. If you need to add a reason to the validation set, hold down the <Ctrl> key and click in the field. The validation set 476 popup will open.
<i>Relationship</i>	If the leave is related to the care of a family member, identifies the relationship, such as mother, father, son.
<i>Family Member</i>	Enabled if a <i>Relationship</i> is selected, the family member's name. An entry is not required.
<i>Eligibility Sent Date</i>	Date FMLA paperwork packet is prepared/sent to employee, form WH-381.
<i>Physician Due Date</i>	Date physician's paperwork, confirming reason for going on leave, is due, form WH-380.
<i>Physician Received Date</i>	Date the physician's paperwork is received.
<i>Designation Date</i>	Date the employee is designated as qualifying for FMLA and form WH-382 is sent to the employee. This designation may occur before or after the employee goes on leave.
<i>Comments</i>	Free-form text field allowing 4,000 characters.
<i>Status History</i>	Displays a description of each change in the status of the request, from latest to earliest, with the latest on top. The description includes the current and previous statuses, the ID of the person who made the change and the date and time of the change.
<i>User-Defined Fields</i>	Customized fields created at Maintenance > new world ERP Suite > Security > User-Defined Fields, using the <b>FMLA Request Record Type</b> .

2. Enter in the appropriate fields as explained above and click **Save**.

When you save a new request, the leave request number is generated automatically. It contains a prefix appended to the next sequential number. The prefix is the year of the *Request Date*. This number comes from the Counters page in Company HR Settings (**Maintenance > Human Resources > Company HR Settings**).

Each new request will use the year and the next available number from the grid on the Counters page. If two users save an FMLA request at the same time, each will receive a different number.

Overlapping leaves are permitted; you will be prompted to accept or cancel an overlapping leave.

If you make an error in processing a leave request, you may change the *Leave Status* back to **Open**, click **Save**, then change the status to **Approved**. All other entries will be enabled for editing. You may change a denied request to open, approved or canceled.

## TIME ENTRY

Use the Time Entry tab to track the actual number of leave hours an employee has taken per week. This tab is enabled once the *Leave Status* on the **FMLA Request** tab is changed to **Approved**.

If necessary, you may enter time after an employee has been paid and processed in payroll. Also, an employee on unpaid leave may not be processed through payroll. Time is tracked separately from payroll.

The screenshot shows the 'FMLA Request Entry' form with the 'Time Entry' tab selected. Under 'Request Info', the employee is 'Roger Durepo' with a start date of '09/08/2016' and an end date of '12/08/2016'. The 'Hours' section features a 'Week Start Date' field and a row of input boxes for days of the week (Sunday through Saturday), followed by an 'Add' button. Below this is a table with columns for 'Delete', 'Start Date', and days of the week, plus a 'Total' column. One row is visible with a start date of '09/04/2016' and '8.0000' hours on Saturday. At the bottom are 'Save' and 'Reset' buttons.

Week Start Date	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
09/04/2016							8.0000	8.0000

1. To add leave time to the grid, select the *Week Start Date*, fill in the applicable days of the week with the number of leave hours, and click the **Add** button. The entries will be added as a row in the grid, and the *Week Start Date* will default to the next Sunday.

- Each Week Start Date must be a Sunday; otherwise, an error message will display when you click Add.
  - For an employee on continuous leave, the typical entries are 8 hours per day for an entire week.
  - For an employee on intermittent leave, entries may be fewer than 8 hours on certain days of the week.
  - Time entry allows four decimal places, same as the number of decimal places allowed in Hours Entry.
  - The request number, employee name and leave date range are displayed above the grid.
2. Once you have added hours to the grid, click **Save** to save them. If you need to edit hours, you may do so directly in the corresponding table cell.

To delete a week from the grid, check the corresponding box in the *Delete* column, and click **Save**.

## FMLA HOURS UPDATE FROM PAYROLL

*Human Resources > FMLA > FMLA Hours Update from Payroll*

**FMLA Hours Update from Payroll** lets you update FMLA taken time from recorded payroll hours, eliminating the need to re-key time.

**FMLA Hours Update from Payroll**

Load Saved Report <input style="width: 90%;" type="text" value=""/>	Distribution Group <input style="width: 90%;" type="text" value=""/>
Override Report Title <input style="width: 90%;" type="text" value=""/>	Email Group <input style="width: 90%;" type="text" value=""/>
Pay Group <input style="width: 80%;" type="text" value=""/>	
Batch <input style="width: 90%;" type="text" value=""/>	
<input checked="" type="checkbox"/> Report Only	
<input type="button" value="Submit"/> <input type="button" value="Save"/> <input type="button" value="Save As"/> <input type="button" value="Delete"/> <input type="button" value="Reset"/>	

After making your selections on this page, click **Submit**. If *Report Only* is selected, a report of the FMLA hours to be updated will be generated and displayed, but the hours themselves will not be updated. If *Report Only* is deselected, the report will be generated and the hours will be updated after payroll processing completes.

Field Name	Field Description
Load Saved Report	<p>Saves this version of the report as a template for later use. When you click <b>Save</b>, a popup will ask you to name the report. Type the name, and click <b>OK</b>.</p> <p>The next time you want to run this report, select its name from the <i>Load Saved Report</i> drop-down, and the fields and list boxes will be populated automatically. If necessary, you may edit entries before running the report.</p> <p>You may save as many templates as you would like.</p>
Distribution Group	<p>A group of people selected to receive the report in <i>myReports</i>. Click in the field to select from a list of existing groups, or click the blue-eye prompt to create a new distribution group. The report will be sent to <i>myReports</i> for each person in the group.</p>
Override Report Title	<p>Overrides the default report title.</p>
Email Group	<p>A group of people selected to receive the report by e-mail. Click in the field to select from a list of existing groups.</p>
Pay Group	<p>Pay group and batch having FMLA hours updated from payroll. Only posted pay batches are available for selection.</p>
Batch	
Report Only	<p>Select to generate only a report showing the FMLA hours to be updated; deselect to generate a report and update the hours.</p>

To allow you identify hours codes that are to be used for FMLA taken time, an FMLA Taken Hours check box has been added to the Hours Code page in Maintenance (Maintenance > Human Resources > Earnings Maintenance > Hours Codes > New/Hours Code).

This check box will not be disabled if the hours code is associated with a "last processed date."

Note: During the FMLA Hours import, the days are processed one at a time. When an employee has exceeded the FMLA limit, an error will show on the report, and the hours will not be imported/updated.

Hours Codes List  
Hours Code - Comp Earned 1.5

Code:

Active:

Hours Category:

Description:

Last Processed Date: 3/21/2015

Effective Dates:

Start Date:

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**Pay Type Information**

Pay Type:

Hours Multiplier:

Default Amount:

Default Percent:

Cap at Cycle Pay:

**Distribution [Select One]**

Debit Account:

Debit G/L Account:

**Project Information**

Project Requirement:

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**Hours Options**

Taxable Only:

Hours Accrual:

Salary:

Seniority Hours:

Employee G/L Override:

Productive Hours:

Workers' Compensation Hours:

FMLA Eligible Hours:

**FMLA Taken Hours:**

Premium Pay:

FLSA Hours:

Pension Hours:

Apply to Longevity:

Apply to Accruals:

Certification Applies:

Save Save/New Delete Reset Copy Tax Information Excluded Hours Excluded Accrual Profiles

## REPORTS

This report shows how much leave time remains for all who are on FMLA leave. The report is sorted alphabetically by employee name, followed by employee number. You will see only the requests from employees who are in departments to which you have been granted security rights through Process Manager.

Click **Print** at the bottom of the Request List page.

FMLA Request Report - Internet Explorer, optimized for Bing and MSN

100% Find | Next

Send to myReports

### FMLA Request Report

Employee	Department	Benefit Group	Request Number	Leave Status	Leave Type	Leave Reason	Relationship / Family Member	Request
405 Alexander, Grace S	Parks - Landscape	Part Time 35 Hour Week	2010 - 00002	Approved	Continuous	CHI/Childbirth/Adoption		01/01
407 Albaugh, Janelle M	Parks	Part Time - No Accruals	2013 - 00017	Approved	Continuous	Mil/Military family leave		05/11
2039 April, Frankie B	Police	Part Time 20 Hour Week	2013 - 00104	Approved	Continuous	Mil/Military family leave		06/01
909 April, Frankie P	Board of Commissioners	Part Time - No Accruals	2013 - 00103	Open	Intermittent	CHI/Childbirth/Adoption	Grandson/Betty White	01/01
2153 Artars, Frank C	Information Technology	Regular Full Time Exempt	2013 - 00112	Open	Continuous	CAR/Care for family member	Daughter/Melissa	06/11
1256 Beahm, Davonte E	Police	FT 40 Hours	2013 - 00005	Approved	Continuous	CHI/Childbirth/Adoption		02/11
23 Citz, Dawn G	Finance	Regular Full Time Non-Exempt	2013 - 00204	Open	Continuous	CAR/Care for family member		09/04
3082 Crystal, Tierra B	Police	Sworn Police	2013 - 00006	Canceled	Continuous	Per/Personal injury/Illness Description		03/04
404 DiLippo, Janae M	Parks	Part Time 35 Hour Week	2013 - 00020	Open	Continuous	CAR/Care for family member	Step Son/Todd Danforth	05/11
5102 DiStefano, Franklin	Legal	Test	2013 - 00108	Approved	Lifetime Chronic	Per/Personal injury/Illness Description		06/11
491 Distel, Demarcus J	NCS	Part Time - No Accruals	2013 - 00031	Approved	Lifetime Chronic	Per/Personal injury/Illness Description	Penny	05/01
54 Fazio, Abbigail W	Police	Regular Full Time Non-Exempt	2013 - 00016	Completed	Continuous	Per/Personal injury/Illness Description		05/31
3255 Fendler, Alessandra B	Parks - Aquatics	Part Time - No Accruals	2012 - 00001	Approved	Intermittent	CAR/Care for family member	Spouse	05/01
21 Ferge, Braden M	Citizen Information & Assistance	Part Time - No Accruals	2013 - 00203	Open	Continuous	CAR/Care for family member		09/01
75 Gerfin, Spencer E	Finance	Regular Full Time Non-Exempt	2012 - 00003	Open	Intermittent	Per/Personal injury/Illness Description		12/01
40 Gonzales, Ravenick A	Board of Commissioners	Elected Officials	2013 - 00015	Completed	Continuous	CAR/Care for family member	Daughter	05/24
1937 Leval, Stephen W	Parks	Part Time - No Accruals	2013 - 00038	Open	Intermittent	CAR/Care for family member		06/01
24 Lorenzana, Marquee A	Finance	Part Time - No Accruals	2013 - 00201	Open	Continuous	CAR/Care for family member	Daughter	10/11
1 Lunford, Hudson	PW - Operations	Regular Full Time Non-Exempt	2013 - 00102	Open	Continuous	CAR/Care for family member		06/04
1 Lunford, Hudson	PW - Operations	Regular Full Time Non-Exempt	2013 - 00002	Approved	Continuous	Per/Personal injury/Illness Description		02/21
1 Lunford, Hudson	PW - Operations	Regular Full Time Non-Exempt	2010 - 00001	Open	Continuous	CAR/Care for family member		06/01
308 Muehn, Karl	PW - Operations	Regular Full Time Non-Exempt	2013 - 00010	Denied	Continuous	Per/Personal injury/Illness Description		04/21
147 Nestico, Abbigail	Parks - Parks Maintenance	Regular Full Time Non-Exempt	2012 - 00100	Open	Intermittent	CAR/Care for family member		12/31
3 Petaet, Hayle	Parks - Athletics	Part Time - No Accruals	2013 - 00202	Open	Continuous	CAR/Care for family member	Daughter	09/01
5 Riederer, Hayden E	Board of Commissioners	Part Time - No Accruals	2013 - 00001	Open	Intermittent	Per/Personal injury/Illness Description		01/11
5 Riederer, Hayden E	Board of Commissioners	Part Time - No Accruals	2011 - 00001	Open	Intermittent	CHI/Childbirth/Adoption		01/01
81 Rotarido, Kassandra N	Police	Part Time - No Accruals	2013 - 00100	Open	Continuous	CAR/Care for family member		06/04
248 Ruggiere, Kirsten L	Fire - Suppression	A Shift Fire Officers	2013 - 00021	Canceled	Continuous	CAR/Care for family member	Daughter/Kara Ruggiere	05/11
88 Sanderson, Kara Q	Police	Sworn Police	2013 - 00036	Approved	Intermittent	Per/Personal injury/Illness Description		05/01
8 Schweiner, Summer O	Board of Commissioners	Part Time - No Accruals	2013 - 00023	Open	Continuous	CAR/Care for family member		05/11
172 Smith, Heriberto P	Police	Part Time - No Accruals	2013 - 00011	Approved	Continuous	Per/Personal injury/Illness Description	Son/Dan Micheli	04/21
2 Sprinkel, Valeria	Police	Part Time - No Accruals	2013 - 00014	Approved	Continuous	CAR/Care for family member		04/31
1014 Suddreth, Regan W	Police	Sworn Police	2013 - 00007	Approved	Continuous	CAR/Care for family member	Spouse/Tom	01/31
62 Tagabari, Luca A	Police	Regular Full Time Non-Exempt	2013 - 00039	Approved	Continuous	CHI/Childbirth/Adoption		06/01

## TIME OFF REQUESTS

[Human Resources](#) > [Time Off Requests List](#) > [Time Off Requests List](#)

From the **Time Off Request List** page, you may review, approve, reject and cancel time off requests that have been made from this page or from the eEmployee module. You will see only the requests from employees whose departments are tied to the role(s) assigned to you in Maintenance.

All time off requests are contained in a grid, with each row corresponding to a request. Requests are sorted by employee name, followed by employee number and request number. You may sort or filter the grid by any column.

Request numbers in the grid link to the corresponding time off requests. Clicking a request number will take you to the details and approval history of the request on the Time Off Request page.

## SECURITY

[Maintenance](#) > [new world ERP Suite](#) > [Security](#) > [Users](#)

1. Select a user from the User List page.
2. Click **Permissions**. The Permissions page for the selected user will open, showing a grid of application security components.
3. Click the *Show Search* link in the top-right corner of the page. The *Component Name*, *Application* and *Company Name* search fields will display.

- In the *Component Name* field, type **time off request** (the entry is not case sensitive).
- Click **Search**.
- The grid will refresh to show two Time Off Request components, *Time Off Request List* and *Time Off Request Settings*.

The screenshot shows the 'Permissions - NWS' interface. At the top, there are search filters: 'Permission Type' set to 'Company Applications', 'Feature Group' set to '<All>', and 'User Specific' checked. The 'Component Name' field contains 'time off request' and the 'Company' dropdown is set to 'new world ERP'. There are 'Search' and 'Reset' buttons. Below the filters is a table with columns: Application, Component, All, Add, Change, Delete, View/Use, and Print. The table contains two rows: 'Human Resources' for 'Time Off Request List' and 'Human Resources' for 'Time Off Request Settings'. The 'All' column has green checkmarks for both rows. The 'Add' column has a green checkmark for 'Time Off Request List'. The 'Change' column has a green checkmark for 'Time Off Request Settings'. The 'View/Use' column has green checkmarks for both rows. The 'Print' column has a green checkmark for 'Time Off Request List'. At the bottom, there are buttons for 'Save', 'Check All', 'Clear All', 'Deny All', 'Inherit', 'User Based', '< Prev', and 'Next >'. The status bar shows 'Current Page: 1', 'Total Number of Pages: 1', and 'Total Records: 2'.

Application	Component	All	Add	Change	Delete	View/Use	Print
Human Resources	Time Off Request List	✓	✓		✓	✓	✓
Human Resources	Time Off Request Settings	✓		✓		✓	

- Select the appropriate permissions for each component. For *Time Off Request List*, selecting **View/Use** adds the Time Off Requests option to the Human Resources menu and enables the links to view request details. It does not enable buttons on the Time Off Request List or Time Off Request pages. Selecting **Add** enables the **New** button on all Time Off Request List views. Selecting **Delete** enables the **Cancel** button on the appropriate views.
- Click **Save**.
- For the permissions to take effect, the user will need to log off and log back on.

## SETUP

### CREATE ROLES

*Maintenance > new world ERP Suite > Security > Roles*

Roles give users access to employees, based on departments; for example, if employee Kevin Taylor works for the Parks and Recreation Department, you will not be able to view or process Kevin's time off requests unless your role includes the Parks and Recreation Department.

- Click **New**. The Role page will open.
- In the *Role* field, type the name of the role.

3. Type the *Description* of the role. (This entry may or may not be the same as the *Name*.)
4. Below the *Role* and *Description* is a grid of users. Select the check boxes next to the users you want to assign to the role. Assign at least one user.
5. Click **Save**.
6. To associate the role and selected user(s) with one or more departments, click the **Departments** button located below the grid. The Associate Departments dialog will open.
7. Select the *User*.
8. To associate the user with departments, select the corresponding department check boxes.
9. Click **Save**.

## APPROVAL MANAGER

Maintenance > new world ERP Suite > Approval Manager

The screenshot displays the 'Create New Process' dialog box over the 'Approval Manager' interface. The dialog includes the following elements:

- Effective Date:** 05/09/2017
- Name:** (empty text field)
- Type:** Time Off Requests (dropdown menu)
- Sequential Approval:**
- Department (0 selected):** A list of departments with checkboxes:
  - 1100 - Board of Commissioners
  - 1200 - Administration
  - 1300 - Citizen Information & Assistance
  - 1400 - Finance
  - 1421 - Finance - Treasury
  - 1422 - Finance - Licensing
  - 1432 - Finance - Accounting
  - 1434 - Finance - Payroll
  - 1500 - Human Resources
  - 1600 - Legal
  - 1700 - Information Technology
  - 2100 - Police

The background interface shows the 'Approval Manager' section with a list of processes:

- Process
- Contains...
- Certification
- HR Initiated
- HR Initiated-CM
- PA-HR 3 Levels
- PA-HR 3 Levels w CM
- Personnel Action - City Manager
- Separation FT
- Separation PT
- Separation PT OLD
- Standard Grant
- Standard Personnel Action

At the bottom of the dialog, there are 'Back' and 'Save' buttons. The background interface has a bottom toolbar with 'New', 'Edit', 'Create Event', and 'Delegates' icons.

1. Click **New**. The Create New Process dialog will open.
2. Select the *Effective Date* of the approval process.
3. Type the *Name* of the approval process.

4. In the *Type* field, select **Time Off Requests**.
5. If you want to set up a sequential approval process, select *Sequential Approval*.
6. A sequential approval process must begin with the first-level approver. An approval marked for return is returned to the previous submitter, and an approval that is rejected ends the approval process, locks the record and moves it to the canceled list.
7. A non-sequential approval process may begin with an approver at any level. Email notifications are sent to all approvers, not only the next in line, that a change or request needs to be approved. A level-3 approval may follow immediately after a level-1 approval, completing the process, despite the lack of a level-2 approval.
8. Select the check boxes next to the departments that will use the approval process.
9. Click **Save**. The Edit Process dialog will open, containing a grid of the department(s) you just added.
10. Click the **Departments** button if you need to add more departments to this process.

Next, you will add approval levels to a department.

1. Select/Highlight a department that will use this approval process.
2. Click **Approval Levels**.
3. The Manage Approval Levels dialog will open.
4. Click **Add**. The Edit Approval Level dialog will open.
5. Type the *Name* of the approval level.
6. In the *Required Approvers (#)* field, type the number of approvers required at this level.
7. Click **Save**. The Manage Approval Levels dialog will reopen, containing a row for the level you just created.

To add another approval level, repeat steps 12-15.

Next, you will add users to the approval level(s).

1. Click the **Back** button. The Edit Process dialog will open.
2. Click the name of a department in the grid. The Manage Approval Levels dialog will open.
3. Click an approval level. The Edit Approval Level dialog will open, with a grid of users displayed below the *Name* and *Required Approvers (#)* fields.
4. Select the check box next to each user who will approve at this level.
5. Click **Save**.
6. Repeat steps 12-20 to add approval levels and users as necessary. When you are finished, the Manage Approval Levels dialog should contain rows for each approval level.
7. You may reorder approval levels by dragging them to the appropriate places.
8. Click **Back** to return to the Approval Manager grid.

## SELECT THE APPROVAL PROCESSES AND ROLES

Maintenance > Human Resources > Time Off Request > Time Off Request Settings

Time Off Request Settings

Time Off Request Settings

Approval Process: Other Approved

Available: 0

Selected: 0

Save

1. Select the Time Off Request *Approval Process*.
2. Select the roles to be used by Time Off Requests by moving them from the *Available* list box to the *Selected* list box.
3. Click **Save**.

## ASSIGN ACCRUAL PLAN PROFILES TO TIME OFF REQUEST

Maintenance > Human Resources > Employee Attributes > Accrual Plans

Accrual Plan List > Accrual Plan Entry - TEACHERS  
Accrual Profile Entry - PERSONAL

Profile Rule Sets

Profile Codes  Hours Category   
Profile Code  Accrual Hours Code

**Calculation Type**

Rule Set Type   
Calculation Based On   
Anniversary Earn Date   
Non Anniversary Earn Date   
Interval Taken   
Interval Earned   
Rounding Method

**Calculation Method**

Apply FTE or Accrual FTE   
Allow Percent   
Allow Percentage (Earned to Exceed 100%)   
Percent Based On Equation  /   
Fixed Hours   
Actual Hours Based On   
Prorate Maximum Balances   
Earn by Hours Worked

**Probation Information**

Based on Date   
Days on Probation

**Payoff Specification**

Payoff Type   
Payoff Hours Code   
Lost Hours Code

**eTimesheets Validation**

Allow Negative Balance

**Time Off Request**

Available For Time Off Request   
Payroll Hours Code   
Allow Negative Balance

1. Click the edit icon next to the accrual plan containing the profile you want to assign to Time Off Request.
2. Click the **Profiles** tab.
3. Click the edit icon next to the profile you want. The Accrual Profile Entry page will open.
4. To make this profile available for time off requests, select the *Available for Time Off Request* check box. Selecting this box will enable the *Payroll Hours Code* field.
5. In the *Payroll Hours Code* field, select the hours code to be charged for the time off during payroll processing.
6. To allow employees with this profile to request time off before it is earned, thus reducing their current balances to less than zero, select the *Allow Negative Balance* check box.

7. Click **Save**.
8. Repeat these steps for each applicable profile.

## SET COUNTERS FOR TIME OFF

*Maintenance > Human Resources > Company HR Settings > Counters*

1. To change a *Counter Number*, double click in the appropriate cell to enable it for editing.
2. Click **Save**.

When the first time off request of the year is created, the counter will display. Each subsequent request for the year will increment the counter by one.

## REQUEST TIME OFF

*Human Resources > Time Off Requests > Time Off Request List*

Employee Number	Employee Name	Request Number	Requested Days	Status	Department	Benefit Group
▽   Equals...	▽   Contains...					

0 - 0 of 0 records

Prev 1 Next Show 25 records

New Print Cancel

1. Click the **New** button. The New Time Off Request dialog will open.
2. Select the employee making the request. Employees who are not terminated and those who belong to departments attached to your role will be available on the drop-down.

**New Time Off Request** ✕

Employee

Ok Cancel

- Click **OK**. The Create Time Off Request page will open, containing a calendar, a grid of available time balances per accrual category and a comments section.

Time Off Request List  
Create Time Off Request - 100242 - Batliner, Bruce

June 2016							July 2016							August 2016						
Sa	Mo	Tu	We	Th	Fr	Sa	Sa	Mo	Tu	We	Th	Fr	Sa	Sa	Mo	Tu	We	Th	Fr	Sa
			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		
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							28	29	30	31			

Clear Selected Dates

Available Balances			
Accrual Category	Balance	Pending Requests	Available Balance
<input checked="" type="radio"/> Personal	24.0000	18.0000	6.0000
<input type="radio"/> Sick Leave/Family Emergency	459.0000	0.0000	459.0000

Comments

Continue

- In the calendar, click the days you are requesting to have off. When selected, they will be shaded in blue. To clear a selected date, click it again. To clear all selected dates, click the **Clear Selected Dates** button.
- In the **Accrual Information** grid, select the radio button next to the accrual category you will be using. Available accrual categories are based on the accrual profile associated with your primary job as of today.
  - Accrual balances are the net of earned time - taken time, as of a specific date.
  - Earned time = payroll hours worked \* hours multiplier, where the hours code is flagged as an accrual.
  - Time taken = payroll hours worked, where the hours code is not flagged as an accrual.
  - Balance (as of date) = earned time - time taken.
  - Payroll hours must be tied to a pay batch with a status of 4 (posted).
  - Hours code must have a pay type of **H** (Hourly).
  - Hours category must be flagged as an accrual.
- In the calendar, click the days you are requesting to have off. When selected, they will be shaded in blue. To clear a selected date, click it again. To clear all selected dates, click the **Clear Selected Dates** button. Select at least one day to continue to the details page.
- In the **Comments** section, type any comments that apply to the time off request. (Comments are not required.)

- Click the **Continue** button. The Create Time Off Request page will refresh, showing a grid of your selections and, if applicable, your comments.

Time Off Request List  
Create Time Off Request - 100242 - Batliner, Bruce

Date	Type	Hours	Delete
07/05/2016	Personal	8.0000	X

+ Add New Entry

\* Required Field

Comments  
Personal

Submit Return to Create Request

The *Hours* column will default the daily hours from the employee's **Jobs** tab in Workforce Administration.

- If you want to change the hours, accrual category or date, click in the appropriate cell to enable it.
- If you want to add another day to the time off request, click **Add New Entry** in the top-left corner of the grid. The top row of the grid will be enabled to let you select the date, type (accrual category) and number of hours, and **Apply** and **Cancel** buttons will display.
- If you are satisfied with the request details, click **Submit**. The primary job of the employee as of the time off request date will be verified, accrual balance and probation validations will be run, a request submitted message will display, the request will be given a number and added to the grid on the Time Off Request List page, and the employee will receive an email notification confirming the request has been submitted and providing a link to the request. The email will be sent to the primary email address set up for the employee in new world ERP.

When you submit a request, an email notification also will be sent to the person(s) responsible for approving the request. If the approval process has been set up as sequential, the notification will be sent to the approver(s) at level 1. If the approval process has been set up as non-sequential, notification will be sent to all users on all levels.

- Approvers also will see a myTasks link for the request on their home pages.

## APPROVE TIME OFF REQUESTS

*Human Resources > Time Off Requests > Time Off Request List*

- Click the employee's hyperlinked *Request Number*. The Time Off Request page will open, containing a series of buttons, including **Print**, **Approve**, **Reject**, **Return** and **Cancel** at the bottom.

If the time off request is at your level of approval, the **Approve** button is active. Click the button to approve the request. If you are not the last or only approver, the request will move to the next approver. Following an approval, rejection or cancellation, the employee will receive an email notification.

**Note:** First-level approvers are not able to return requests to the submitters. Also, requests cannot be returned to eSuite.

**Note:** If the request has been submitted and you have permission in Approval Manager at the current level of 2 or higher, the Return button is enabled. If you do not have permission set up in Approval Manager or have it at the current level of 1 only, the button is disabled. If the request has not been submitted, the button is disabled. Once you have submitted a return, the approval status timeline is updated.

2. To approve the request, click the **Approve** button. The Approve dialog will open.

3. You may add a comment, if applicable.
4. Click **Submit**. The Approve Results pop-up will display.

5. Click **Close**. The approval timeline will update to show the approval progress, and the Time Off Request List page will update to show the latest approval *Status*.

The screenshot shows a 'Time Off Request' form for employee Marcus S. Bruh. The form has a progress bar at the top with three levels: Level 1 (Approved), Level 2 (In Progress), and Level 3 (Waiting). Below the progress bar, the employee number is 2638, the request number is 2016-000001045, the department is 2123 - Police - Communications, and the benefit group is Regular Full Time Non-Exempt. A table titled 'Requested Dates' lists five dates from 08/01/2016 to 08/05/2016, all for 'Vacation' with 8.0000 hours. A 'Comments' field is located below the table.

Requested Dates:	Date	Type	Hours
	08/01/2016	Vacation	8.0000
	08/02/2016	Vacation	8.0000
	08/03/2016	Vacation	8.0000
	08/04/2016	Vacation	8.0000
	08/05/2016	Vacation	8.0000

**Note:** You may approve, reject, return or cancel multiple requests from the Time Off Request List page by selecting the check boxes next to the requests and clicking the appropriate button at the bottom of the page.