

## 8.9 HRMS Step by Step Guide

### Entering Leave and Adjusting Leave Balances (MON) – Time Collection Module

**Overview** This guide provides instruction on entering leave taken by monthly employees, making adjustments to leave balances reflected in the system, and/or to enter existing balances for state classified employees who have transferred or reinstated from other state agencies or departments.

**Note:** The screen shots used in this guide may not be representative of your access.

#### CREATE A BATCH

##### 1. Navigate to the Batch Header page

- Time Collection
- Batches
- Batch Header

The screenshot shows the University of Colorado HRMS interface. On the left is a navigation menu with a search bar and a tree view containing: My Favorites, Reports and Reviews, Recruiting, Workforce Administration, Compensation, Time Collection (expanded), Batches (expanded), Time Entry Reports, and Find Batches. The Batches sub-menu includes: Batch Header, EE Data - Current Appointment, Appointment, EE Data - Expired Appointment, Appointment, EE Data - One Time Payment, EE Data - Entered in Batch, Time Entry Reports, and Find Batches. The main content area displays the 'Batches' page with a breadcrumb 'Main Menu > Time Collection >' and a 'Batches' header. Below the header, there are two sections: 'Time Entry Batches' and 'EE Data'. The 'Time Entry Batches' section contains a 'Batch Header' link with the text 'Batch Header - testing trace'. The 'EE Data' section contains four links: 'EE Data - Current Appointment', 'EE Data - Expired Appointment', 'EE Data - One Time Payment', and 'EE Data - Entered in Batch'.

##### 2. Header Control page displays

- Click **Add a New Value**
- Enter Pay Group of “MON”
- Enter Batch ID – a Batch ID must consist of a three alpha and/or alpha-numeric code  
**Note:** You must use different Batch IDs to create multiple batches in the same pay group and the same pay period. You may reuse Batch IDs from pay period to pay period
- Click **Add**

#### Header Control

**Find an Existing Value** | **Add a New Value**

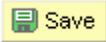
**Pay Group:**

**Batch ID:**

**Add**

[Find an Existing Value](#) | [Add a New Value](#)

### 3. Batch Header page displays

- Enter Description that uniquely identifies the batch (optional)
- Batch Status of Open will default – leave as is
- Click 

<b>Company:</b>	CU	University of Colorado	<b>Batch ID:</b>	AD1
<b>Pay Group:</b>	MON	Monthly Employee	<b>Batch Source:</b>	<input type="radio"/> Online
<b>Pay End Date:</b>	11/30/2006			
<b>Created By:</b>	T803599			

**Description:**

51000 AD

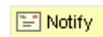
One Time Payment Only?

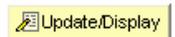
**Batch Status**

<input checked="" type="radio"/> Open	<input type="checkbox"/> Approved
<input type="radio"/> Cancelled	<input type="checkbox"/> Processed
<input type="radio"/> Ready	

Batch Totals			
<b>EE Count:</b>	0	<b>Pay Amt:</b>	\$0.00
<b>Addl Amt:</b>	\$0.00	<b>Hours:</b>	0.00

Approved Totals			
<b>EE Count:</b>	0	<b>Pay Amt:</b>	\$0.00
<b>Addl Amt:</b>	\$0.00	<b>Hours:</b>	0.00

### ENTER LEAVE OR ADJUSTMENT INFORMATION

#### 4. Without cancelling out of the Batch Header page, navigate to the EE Data-Current Appointment or EE Data-Expired Appointment page

- Using the left-hand navigation menu, click EE Data-Current Appointment or EE Data-Expired Appointment



PeopleSoft.

HR88PRAC T. PPL Home | Worklist | Add to Favorites | Sign out

Menu

Search:

- My Favorites
- Reports
- Recruiting
- Workforce Administration
- Compensation
- Time Collection
  - Batches**
    - Batch Header
    - EE Data - Current Appointment
    - EE Data - Expired Appointment
    - EE Data - One Time Payment
    - EE Data - Entered in Batch
- Time Entry Reports
  - Find Batches
- Workforce Development
- Organizational Development
- Enterprise Learning
- Reporting Tools
- My Dictionary

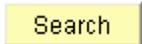
Menu > Time Collection >

**Batches**

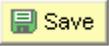
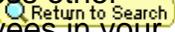
Time Entry Batches

Batch Header Batch Header - testing trace	EE Data - Current Appointment EE Data - Current Appointment	EE Data - Expired Appointment EE Data - Expired Appointment
EE Data - One Time Payment EE Data - One Time Payment	EE Data - Entered in Batch EE Data - Entered in Batch	

## 5. EE Data search page displays

- Enter Paygroup
- Enter Batch ID
- Enter EmplID and/or Department and any other search categories
- Click 

## 6. Time Entry Data page displays

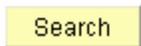
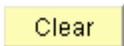
- Enter applicable Earnings Code
- Enter Hours
  - a) Enter leave hours taken as a positive #
  - b) Enter leave balance adjustments as either a positive # (increase accrual balance) or negative # (decrease accrual balance)
- To add additional earnings code(s), click 
- Click 
- Click  or  to access other employees in your department for time entry

## EE Data - Current Appointment

Enter any information you have and click Search. Leave fields blank for a list of all values.

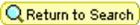
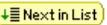
### Find an Existing Value

**Pay Group:** begins with   
**Batch ID:** begins with    
**Department:** begins with    
**EmplID:** begins with   
**Empl Rcd Nbr:** =   
**Name:** begins with   
**Last Name:** begins with



[Basic Search](#)

[Save Search Criteria](#)

### Time Entry Data


**Company:** CU University of Colorado      **Batch ID:** AD1 Open  
**Pay Group:** MON Monthly Employee      **Pay End Date:** 11/30/2006

**EmplID:** 105654      0 Schneider, Cary R.

**Pay Status:** A Active      **Job Code:** H6G3XN

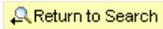
**Rate:** \$32.23      **Position:** 00508127

Employee TE Status	
<input type="radio"/> Cancelled	<input type="checkbox"/> Approved
<input type="radio"/> Ready	<input type="checkbox"/> Processed

**Leave**  
**Sick:** 140.63      **Vacation:** 91.19

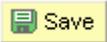
[Customize](#) | [Find](#) | [View All](#) |  First 1-2 of 2 Last

*Earnings Code	Hours	Addl Amt	Override Rate	Speedtype	Pay Amount		
1 VAC  VACATION	16.00						
2 SCK  SICK LEAVE	4.00						
							
<b>Totals</b>							
	20.00	\$0.00			\$644.52		


## MARK BATCH 'READY FOR APPROVAL'

7. Without cancelling out of the page after saving the last employee's data, navigate to the Batch Header page

- Using the left-hand navigation menu, click "Batch Header"
- Change Batch Status to "Ready"
- Click 

<b>Company:</b>	CU	University of Colorado	<b>Batch ID:</b>	AD1
<b>Pay Group:</b>	MON	Monthly Employee	<b>Batch Source:</b>	<input type="radio"/> Online
<b>Pay End Date:</b>	11/30/2006			
<b>Created By:</b>	T803599			

**Description:**  
51 000 AD

One Time Payment Only?

**Batch Status**

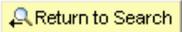
<input type="radio"/> Open	<input type="checkbox"/> Approved
<input type="radio"/> Cancelled	<input type="checkbox"/> Processed
<input checked="" type="radio"/> Ready	

**Batch Totals**

<b>EE Count:</b>	1	<b>Pay Amt:</b>	\$644.52
<b>Addl Amt:</b>	\$0.00	<b>Hours:</b>	20.00

**Approved Totals**

<b>EE Count:</b>	0	<b>Pay Amt:</b>	\$0.00
<b>Addl Amt:</b>	\$0.00	<b>Hours:</b>	0.00

## APPROVE THE BATCH

8. Without cancelling out of the Batch Header page, navigate to the Approve Time Entry/No OTP page

- Using the left-hand navigation menu, click "Approve Time Entry/No OTP"

University of Colorado

Menu

Search:

- ▶ My Favorites
- ▶ Reports and Reviews
- ▶ Recruiting
- ▶ Workforce Administration
- ▶ Compensation
- ▶ Time Collection
  - ▼ Batches
    - Batch Header
    - EE Data - Current Appointment
    - EE Data - Expired Appointment
    - EE Data - One Time Payment
    - EE Data - Entered in Batch
- ▶ Time Entry Reports
- ▶ Find Batches
- ▶ Workforce Development
- ▶ Organizational Development
- ▶ Enterprise Learning
- ▶ Reporting Tools

HR89TEST T PPL Home

New

<b>Company:</b>	CU	University of Colorado	<b>Batch ID:</b>	AD1
<b>Pay Group:</b>	MON	Monthly Employee	<b>Batch Source:</b>	<input type="radio"/> Online
<b>Pay End Date:</b>	02/28/2007			
<b>Created By:</b>	139127			

21187 SOM-PSYCH UCH OP GEN OPS

**Description:**  
51000 AD

One Time Payment Only?

**Batch Status**

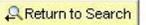
<input type="radio"/> Open	<input checked="" type="checkbox"/> Approved
<input type="radio"/> Cancelled	<input type="checkbox"/> Processed
<input checked="" type="radio"/> Ready	

**Batch Totals**

<b>EE Count:</b>	1	<b>Pay Amt:</b>	\$254.61
<b>Addl Amt:</b>	\$0.00	<b>Hours:</b>	15.00

**Approved Totals**

<b>EE Count:</b>	1	<b>Pay Amt:</b>	\$254.61
<b>Addl Amt:</b>	\$0.00	<b>Hours:</b>	15.00

### 9. Time Entry Approve tab displays

- Click "View All" to view all employees included in batch
- Click the  to the left of the employee's name to view the time entry data entered for the employee

**Time Entry Approve**

<b>Company:</b> CU University of Colorado	<b>Description:</b> 51 000 AD	
<b>Pay Group:</b> MON Monthly Employee	<b>Pay End Date:</b> 11/30/2006	
<b>Batch ID:</b> AD1	<b>Batch Source:</b> Online	<b>Batch Status:</b> Ready
<b>Batch Added By:</b> T803599	<input type="checkbox"/> Approved By:	

TE	Name	#	Hours	Addl Amt	Pay Amount
	Schneider,Cary R.	0	20.00	\$0.00	\$644.52

Batch Ready Totals:	1 Employees	20.00	\$0.00	\$644.52
Batch Approved Totals:	0 Employees	0.00	\$0.00	\$0.00

### 10. Employee Time Detail page displays

- Review the time entry information for accuracy
- Click  to return to the Time Entry Approve tab

**Employee Time Detail**

**EmpID:** 105654      **Schneider,Cary R.**      **Rcd#:** 0

Erncd	Description	Hours	Addl Amt	Override Rate	Override Spdy/Acct	Pay Amount
SCK	SICK LEAVE	4.00	\$0.00			\$128.904 <input type="button" value="+"/> <input type="button" value="-"/>
VAC	VACATION	16.00	\$0.00			\$515.616 <input type="button" value="+"/> <input type="button" value="-"/>

## 11. Time Entry Approve page displays

- Click the “Approved By” checkbox to approve all entered time entry records for the batch
- Click 
- The checkbox to the right of each employee’s time entry data will now be checked on
- Deselect the checkbox to the right of the employee’s data to un-approve the time entry
- Click 

**Time Entry Approve**

<b>Company:</b> CU University of Colorado	<b>Description:</b> 51000 AD	
<b>Pay Group:</b> MON Monthly Employee	<b>Pay End Date:</b> 11/30/2006	
<b>Batch ID:</b> AD1	<b>Batch Source:</b> Online	<b>Batch Status:</b> Ready
<b>Batch Added By:</b> T803599	<input checked="" type="checkbox"/> <b>Approved By:</b> Smith, Terri R.	

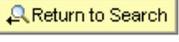
  

TE	Name	#	Hours	Addl Amt	Pay Amount
	Schneider, Cary R.	0	20.00	\$0.00	\$644.52 <input checked="" type="checkbox"/>

Batch Ready Totals:	1 Employees	20.00	\$0.00	\$644.52
Batch Approved Totals:	1 Employees	20.00	\$0.00	\$644.52


## Entering Leave and Adjusting Leave Balances (MON) Complete

### Additional Notes:

**EE Data-Current Appointment:** a current appointment implies the employee status is Active and the Appointment End Date is later than the beginning date of the current pay period.

**EE Data-Expired Appointment:** the employee status is Terminated or On Leave and the Appointment End Date is prior to the beginning date of the current pay period.

**Entering data:** If you have only a few employees to enter into a batch, search by Employee ID # (EmplID). If you search by Name, Last Name, or % Sign, you must also enter your department number. If you enter time records for multiple departments, you can enter data for only one department at a time.

**Active Appointments:** If there is only one active empl rcd [employee record] within your row-level security for the employee, the system will take you directly to that record. If the employee has more than one active empl rcd within your row-level security, it will display all of them, and you must select the appropriate one for which you wish to enter leave.

**SpeedType:** This field is for changing/overriding (for the current pay period only) the SpeedType(s) recorded on the position’s funding distribution page.

**Override Rate:** Use this field to enter hours at a different hourly rate to be paid (for the current pay period only). Offline authorization is required for use of the override rate field.