

Human Capital Management: Step-by-Step Guide

My Leave for Supervisors (Approving Time and Assigning Proxies)

This guide describes tasks that supervisors can perform in My Leave, the university's time-keeping system. Supervisors are responsible for approving employee timesheets and leave requests. Timesheets should be approved by the 10th of the month. Supervisors who are unable to approve requests due to absence can assign a proxy to manage approvals on their behalf for a defined period of time.

As a user of My Leave, you should already have set your preferences as described in <u>My Leave Basics:</u> <u>Setting Preferences and Entering Time Step-by-Step Guide</u>.

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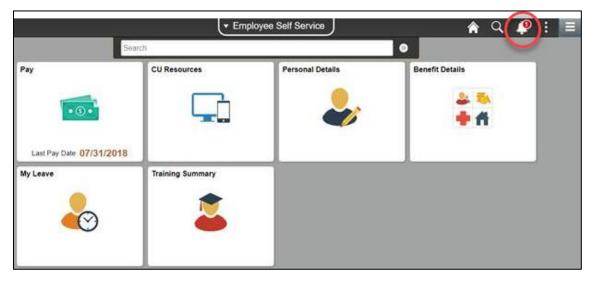
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Approving Time and Leave Requests

While you can approve time and assign proxies through the portal (CU Resources Home> Manager), this guide describes how to perform these tasks through HCM.

To access pending approvals,

- 1. From the portal, click the **HCM** tile.
- 2. Click the Notifications icon located at the top of the page.



The Notifications menu displays pending actions.

			Â	Q	9	:
	Actions (3)	Alerts			View All	C
•	Leave Ap	proval				
•	Leave Ap	proval				
•	Leave Ap	proval				
	Leave Ap	proval				
	Timeshee	et Approval				

Note: If a proxy has been assigned, only the proxy will receive the timesheet and leave requests, not the supervisor. The proxy can access approval requests through the Notifications icon in HCM.

To approve requests in My Leave:

1. Select the **Leave Approval** request or **Timesheet Approval** request you would like to review, approve, or deny. Your Approval Inbox appears.

Approval Inbox				
Indiradedon type.	CULeaveApproval	¥		
Use Saved Search:		¥		
Empl ID	begins with	♥ 237241		
Name	begins with	¥		
Earnings Code	equal to	v	Q	
Search Clear	Advanced Search	Save Search Criteria	Delete Saved Search	Personalize Search

2. To view all requests, click **Search**. You can also search for a specific employee by entering the Empl ID before clicking Search.

3. Click an **Empl ID** of an employee whose timesheet you want to review.

\ppr	oval Inbox								
	sactionType: Saved Search:	CUTin	nesheetApproval	~					
		Clear	begins with begins with equal to	> > >					
	sheet Details	Ciedi	Advanced Search	Save Search (intena D	Personalize	Find View All	L Eiret 🕢	1-4 of 4 🛞 Last
	Select Flag		Name	Empl ID	Empl Record	Pay Period End Date	Start Datetime	End Datetime	Status
1					0	08/31/2018	07/01/18 12:00AM	07/31/18 12:00AM	Requested
2					1	01/31/2017	12/01/16 12:00AM	12/31/16 12:00AM	Requested
3					1	02/28/2017	01/01/17 12:00AM	01/31/17 12:00AM	Requested
4					0	08/31/2018	07/01/18 12:00AM	07/31/18 12:00AM	Requested
~									

The timesheet displays.

4. Review the hours listed on the timesheet by week. The timesheet totals are listed on the bottom of the timesheet.

ay Period Ending: 07/01/18 - 0	0//31/18 leave to b	e reported for (J8/31/18 J0D	0,001-011	-iig	Lase	idal Service	es Employee				
- Job Requested on 08/27/2018 13:5	: 0, Department: 5	1000 Time V	Vorked from	07/01/2018	through 07	//31/2018. E	lased on sta	andard hours	s per week of 40			
07/01/2018 through 07/07/2												
Week 1	Sun	Mon	Tue	Wed	Thu	Fri	Sat			Sub Total	Adjust	Total
	07/01	07/02	07/03	07/04	07/05	07/06	07/07					
Time In		07.30			07.30	07.30						
Time Out		12.30			12.30	12.30						
Time In		13.30	07.30		13.00	13.30						
Time Out		16.30	12.30		16.00	16.30						
Time In			13.30									
Time Out			15.00									
Regular Earnings Salary	0	8	6.5	0	8	8	0			30.5	0	30.5
Administrative Leave	0	0	1.5	0	0	0	0			1.5	0	1.5
Holiday	0	0	0	8	0	0	0			8	0	8
Total	0	8	8.0	8	8	8	0			40.0	0	40.0

Note: Time being sent to CU Time for payroll processing is indicated with a Y in the Send to HRMS column. If your employee has a DK1, which is a dock, and the Totals section contains a Y to Send to HRMS, your employee will be docked pay. For more information about reading timesheet balances, refer to <u>My</u> <u>Leave Basics: Setting Preferences and Entering Time Step-by-Step Guide</u>.

Totals						
Send To HRMS	Earn Code	Description		Hours	Rate	Total
N	RGS	Regular Earnings	Salary	144.25	1	144.250
Y	ADM	Administrative Le	ave	1.5	1	1.500
Ν	HOL	Holiday		8	1	8.000
Y	OTM	Overtime		0.25	1	0.250
Y	VAC	Vacation Leave		16	1	16.000
Y	FSK	Family Sick Leav	e	4.75	1	4.750
Y	SCK	Sick Leave		1.5	1	1.500
		TOTAL:		176.25		176.250
Speed Types						
Speed Type	Send To HR	MS Earn Code	Description	Hours	Rate	Total
	Y	ADM	Administrative Leave	1.5	1	1.500
	Y	OTM	Overtime	0.25	1	0.250
	Y	VAC	Vacation Leave	16	1	16.000
	Y	FSK	Family Sick Leave	4.75	1	4.750
	Y	SCK	Sick Leave	1.5	1	1.500

5. Once you have reviewed the timesheets, select the checkbox by the employee's name and then select **Approve** or **Deny**.

		o.ou.	Advanced Search	Save Search Ch
Time	sheet Details	S		
	Select Flag		Name	Empl ID
1 2		Anna Ing		
>				
	Approve	Deny		

You also have the ability in My Leave to review all of your employees. If you would like to review all of your employees, you can view the employee's calendar by selecting the employee from the drop-down list on your Calendar tab in My Leave and move from employee to employee.

Nancy Scott F Steph: 0 Tristar	(M)
Scott F Steph Tristar	legin
Tristar	
Williar	5/0
	5/01

Note: HCM sends email notifications to supervisors for the actions they can take in the system. You can select which notifications you want to receive on the My Leave Preferences page. To access your My Leave Preferences, click the **Preferences** button from your My Leave calendar. Refer to <u>My Leave Basics:</u> <u>Setting Preferences and Entering Time Step-by-Step Guide</u> for more information.

MyLeave Email Triggers	As Employee	As Superviso
Alter Event	v	
Timesheet Cancel / Rebuild	✓	
Designate Change	v	
Leave Approve / Deny	v	✓
Leave Request Delete	v	✓
Preferences Change	v	
Leave Request	✓	✓
Timesheet Submit	✓	✓
Timesheet Auto-generated	✓	
Timesheet Approve / Deny	✓	v

Assigning a Proxy to Perform Your Approvals

A proxy is someone you designate to manage your approvals on your behalf, such as when you are out of the office for a period of time and will not be available to approve your employees' My Leave requests. A proxy can be assigned to a specific transaction type or to all. Supervisors must should set up their own proxies.

This guide begins with steps for adding one proxy for all transactions, and then shows how to add one or several different proxies to individual transactions.

Note: If a proxy has been established, only the proxy will receive the timesheet and leave requests, not the supervisor.

To assign a proxy:

- 1. From the portal, click the **HCM** tile.
- 2. Click the **Employee Self Service** drop-down and select **Manager Self Service**. The Manager Self Service dashboard appears:

	▼ Manager Self Service		Â	Q	4	:	
Search		⊘					
Approvals	Team Training Summary	Assign A Proxy					
0							

- 3. Click the **Assign a Proxy** tile. The Proxy page appears.
- 4. If the proxy is being established for the first time, click the **Add a New Value** tab. You must know the User ID of the proxy.

Assign Proxy User
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value Add a New Value
Search Criteria
User ID begins with SHAD000099 Case Sensitive

5. Select the lookup (magnifying glass) next to Alternate User ID.

Assign Proxy User		Clear setup			
User ID: SICA000006 Description: Nancy Sicali					
Apply to all					
Alternate User ID:	Q				
Effective Date	31				
From: Effective Date To:	31	Apply for all transactions			
Proxy User Preferences		Personal	ize Find View All 🖉 🌆	View %1) 1-4 of 4 🕑 Last
Proxy User Preferences Transaction	Alternate User ID	Personal	ize Find View All 🔄 📑 Effective Date From		1-4 of 4 🕑 Last
	Alternate User ID		Effective Date		Composition of the second
Transaction	Alternate User ID	Description	Effective Date From	Effective Date To	Disable Proxy
Transaction 1 CULeaveApproval	Alternate User ID	Description	Effective Date From	Effective Date To	Disable Proxy

6. Search for the employee who will be the proxy.

Note: The User ID is different from an employee ID. If you are uncertain of the User ID of the employee you want as the proxy, select **contains** from the Description drop-down list, type the proxy's last name and press **Enter**. A selection list will display, and you can select the employee from the list.



7. Click the person's name.



8. Select the timeframe you want the proxy to perform approvals.

Alternate User ID:	SICA000006	Sicalides-Tucker, Nancy
Effective Date From:	11012015	
Effective Date To:	12312025	Apply for all transactions

9. Click **Apply for all transactions**. The system updates the Proxy User Preferences with your selected proxy and timeframes.

Proxy User Preferences			Personalize	Find View All	-	View %1		1-4 of 4 D Las
Transaction	Alternate User ID		Description	Effective Date From		Effective Date	Го	Disable Proxy
1 CULeaveApproval	GRUD000010	Q	Grudle, Joshua Adam	01/01/2016	H	12/31/2016	H	
2 CUPETApproval	GRUD000010	Q	Grudle, Joshua Adam	01/01/2016	31	12/31/2016	31	
3 CUTimesheetApproval	GRUD000010	Q	Grudle, Joshua Adam	01/01/2016	H,	12/31/2016	n	
4 ePARApproval	GRUD000010	Q	Grudle, Joshua Adam	01/01/2016	31	12/31/2016	31	

10. Click Save.

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Assigning Multiple Proxies to Approve Individual Transactions

To assign a different proxy to individual transactions:

- 1. Click the lookup next to Alternate User ID.
- 2. Search for the employee who will be the proxy.
- 3. Click the person's name.
- 4. Specify the timeframe you want the proxy to perform approvals of the selected transaction.
- 5. Click Save.

Proxy User Preferences			Personalize	Find View All 🕮	View %1	🕚 1-4 of 4 🕚 La
Transaction	Alternate User ID		Description	Effective Date From	Effective Date T	o Disable Proky
1 CULeaveApproval	GRUD000010	Q	Grudle, Joshua Adam	01/01/2016	02/29/2016	9
2 CUPETApproval	BORR000094	Q	Borrego, Trista Marie	01/01/2016	03/31/2016	9
3 CUTimesheetApproval	KENT000144	Q	Kent, Melissa	01/01/2016	04/15/2016	ij 🗆
4 ePARApproval	GRUD000010	Q	Grudle, Joshua Adam	01/01/2016	01/31/2016	

Removing a Proxy before the Scheduled Effective End Date

To remove a proxy before the end date that was originally set.

- 1. From the portal, click the **HCM** tile.
- 2. Click the **Employee Self Service** drop-down and select **Manager Self Service**. The Manager Self Service dashboard appears:

 Manager Self Service 				
Approvals		Assign A Proxy		
	0		→	

- 3. Click the Assign a Proxy tile. The Proxy User Preferences page appears.
- 4. For the proxy you no longer want managing approval, select the **Disable Proxy** box.
- 5. Click Save.

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Note: HCM runs a security process four times a day that picks up the proxy settings; therefore, the person you saved as the proxy may not have immediate access through the portal.