

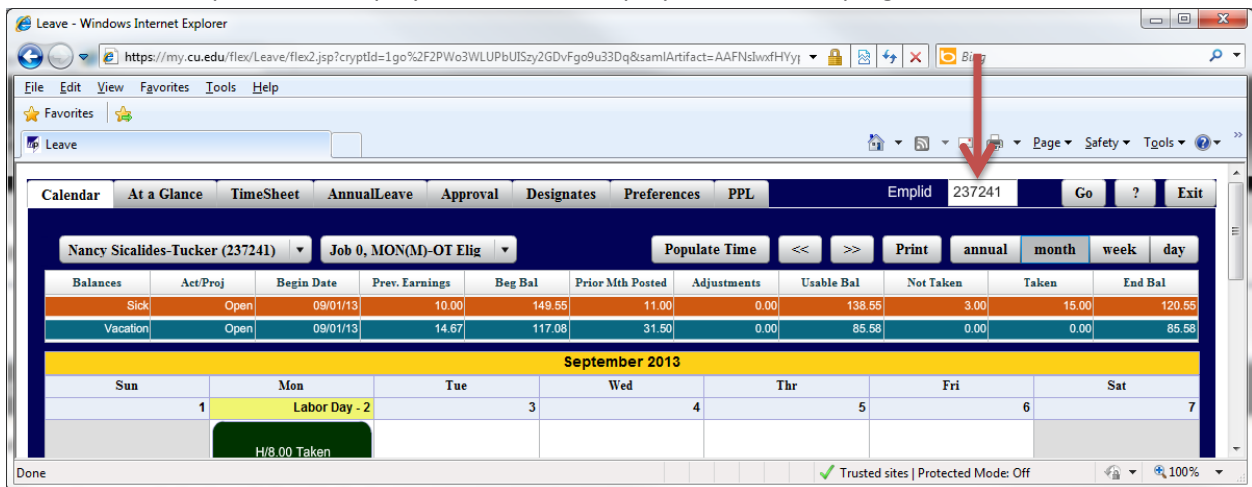
CU Portal - My.Leave Channel Step-by-Step Guide Payroll Personnel Liaison (PPL) Guide

Overview: This guide provides instruction for PPL functions inside the My.Leave portal. This includes instructions for the look up features, PPL page, auto-generating exempt timesheets, and moving My.Leave data to time collection in HRMS.

***Users must be assigned the 'PPL' user role in HRMS to have full access to the functions outlined in this guide, including upload to HRMS Time Entry. ** The functionality available to PPLs in My.Leave tabs include: Calendar, Timesheet, Approval, Preferences and Designates.*

1. View/Update Other Employees' Calendars

- If you have PPL access in HRMS, you have access to look at entries, settings and other pages for other employees within your department(s).
- To look up another employee, enter the Employee ID in the top right corner and select Go.



The screenshot shows the My.Leave portal interface. The top navigation bar includes tabs for Calendar, At a Glance, TimeSheet, AnnualLeave, Approval, Designates, Preferences, PPL, and a search field for Employee ID (Emplid) with a 'Go' button. Below the navigation bar, the user is logged in as Nancy Sicalides-Tucker (237241) for Job 0, MON(M)-OT Elig. The main content area displays a table of balances and a calendar for September 2013. The calendar shows Labor Day on Monday, September 2nd, with 8.00 hours taken. The status bar at the bottom indicates 'Trusted sites | Protected Mode: Off'.

Note: Any entries or updates that you save on behalf of another employee will be reflected in an audit table.



2. PPL Review Page

- This tab is only available to users with PPL access in HRMS. The page shows all employees by pay period including: timesheet status and supervisor.
- Click on any column head to sort by the data in that column.
- PPL has the ability to view Monthly or Biweekly employees and to choose which department(s) to view (within the PPL's security access). This includes current and past pay periods for both Monthly and Bi-Weekly employees.
- Timesheets have four possible status types in My.Leave:
 - Not submitted (employee has taken no action)
 - Requested (timesheet has been submitted for approval)
 - Approved (timesheet is ready to upload to HRMS batch)
 - Posted (batch ID used for HRMS time entry is listed)

3. Auto-Create Exempt Timesheets

- If your department does not require employees exempt from overtime to submit a monthly timesheet, you may auto-create them. (Timesheets are required to post leave usage in HRMS.)
- Click on rows to select multiple employees (hold CNTRL button and select rows). Press

Auto-Create OT Exempt Time Sheets

in the bottom left corner. Timesheets will be created in "Approved" status and ready to load into HRMS.



4. Load Batch Data into HRMS Time Collection

- Create a Time Collection Batch in HRMS. If you have access to multiple departments, select only those you wish to upload.
- Click the checkbox Load Data from Leave App to automatically load all approved exception time from timesheets in My.Leave.
- Save your batch header.

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Menu

Search: []

- My Favorites
- Self Service
- Reports and Reviews
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Time Collection
 - Batch Header
 - EE Data - Current Appointment
 - EE Data - Expired Appointment
 - EE Data - One Time Payment
 - EE Data - Entered in Batch
 - Approve Time Entry/No OTP
 - Time Entry Reports
 - Find Batches
 - Workforce Development
 - Organizational Development
 - Enterprise Learning
 - Worklist
 - Reporting Tools
 - PeopleTools

Time Entry Header

Company: CU University of Colorado Batch ID: PBS
 Pay Group: MON Monthly Employee Batch Source: Online
 Pay End Date: 08/31/2010
 Created By: 125727 Hoffman, Judy Ann 51000 Payroll & Benefit Services

Description: Time Load for September
 One Time Payment Only
 Load Data from Leave App

Batch Status: Open Cancelled Ready Approved Processed

Batch Totals
 EE Count: 0 Pay Amt: \$0.00
 Addl Amt: \$0.00 Hours: 0.00

Approved Totals
 EE Count: 0 Pay Amt: \$0.00
 Addl Amt: \$0.00 Hours: 0.00

Load Data from My.Leave for Departments:

| Department | Selected |
|------------|-------------------------------------|
| 1 51000 | <input checked="" type="checkbox"/> |
| 2 52031 | <input type="checkbox"/> |
| 3 AMP | <input type="checkbox"/> |

Buttons: Save, Notify, Add, Update/Display

- Review counts from Batch Totals. The comment box shows which employee IDs loaded successfully have

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 Created By: 125727 Hoffman, Judy Ann 51000 Payroll & Benefit Services

Description: Time Load for September
 One Time Payment Only
 Load Data from Leave App

Batch Status: Open Cancelled Ready Approved Processed

Batch Totals
 EE Count: 6 Pay Amt: \$1,792.79
 Addl Amt: \$0.00 Hours: 52.54

Approved Totals
 EE Count: 0 Pay Amt: \$0.00
 Addl Amt: \$0.00 Hours: 0.00

Load Data from My.Leave for Departments:

| Department | Selected |
|------------|-------------------------------------|
| 1 51000 | <input checked="" type="checkbox"/> |
| 2 52031 | <input type="checkbox"/> |
| 3 AMP | <input type="checkbox"/> |

The following employees were loaded into HR from My.Leave: 105260 119048 <<125727-Error getting component >> 125771 147011 151792 177556 <<222169- Error getting component >>

Buttons: Save, Notify, Add, Update/Display



Additional Information

- Review the posted time entry approval deadlines documented on the Payroll Calendar.
- Wait to upload data to HRMS Time Collection until most of the timesheets for your department are approved.
- Load Data checkbox can be turned off/on and re-saved multiple times to upload more My.Leave data. Only new/ updated approved timesheets will upload.

5. Upload Time Entry Data by Employee

- The PPL can also load and individual My.Leave timesheet.
- Once a batch header has been created, go to HRMS Time Collection, EE Data Current Appt.
- Search for the individual employee.

- If there is data available, the Load Data button will be **YELLOW**. If not, the button **GRAY**. Click the Load Data button and save. If needed, you can edit the data loaded from My.Leave.



6. Correcting/Reloading Upload Data

- Once hours have been uploaded from My.Leave to the HRMS time entry batch, the My.Leave timesheet is locked.
- If a timesheet error is identified before the time entry deadline passes, the following steps are needed to open the timesheet back up, to allow corrections.
 - Either delete all rows of data loaded in Time Collection for this employee or mark Employee TE Status as Cancelled. SAVE your changes.
 - Once the calendar entries are updated and the modified timesheet is submitted and approved in My.Leave, use the Load Data button to upload the timesheet information back into your HRMS batch. ***Note: if the PPL makes manual changes in the batch in HRMS, ensure you update the employee’s calendar in My.Leave. This will ensure all documents match for auditing.**
 - Before approving the batch, make sure the TE Status is set to Ready.

7. Time Data Upload for Department PPL

- Restrictions on the Time Entry pages will not allow an HRMS user to enter his/her own time.
- HRMS users will not be able to load their own individual data from My.Leave.
- When the My.Leave upload is completed, the department PPL will see his/ her emplid listed in the comment box as “Error getting component” (see image below).
- A different HRMS user (with PPL access) will need to upload this time on behalf of the department PPL, using one of these methods:
 - a) Batch Header: uncheck box to Load Data from Leave App, save, select box again and save again.
 - b) EE DATA – Current Appointment: using a batch ID, pull up page for PPL, click Load Data button, save.

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