



leave

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This tab is used to update leave data for groups of employees by a variety of criteria including pay type, pay grade, primary campus, payroll frequency, and employee number. The Leave tab allows users to add, delete, and zero leave values for all types of leave that are currently established on the Leave Type Description tab of the Leave table. Users may update leave data including totals for leave earned, leave used, and leave balance for the various types of leave, both state and local. Once leave data is altered using this tab, changes are reflected in the individual leave records.


Mass update leave:

Under **Parameters**, select the employees whose leave data is to be changed.

| Field | Description |
|----------------------------|---|
| Pay Status | Select whether active, inactive, or both groups are to be included in the process. |
| Pay Type | Click <input type="button" value="v"/> to select the one-digit pay type to be included in the process. The system is set to All. |
| Job Code | Click <input type="button" value="v"/> to select the four-digit job code to be included in the process. The system is set to All. |
| Accrual Code | Click <input type="button" value="v"/> to select the one-character accrual code to be included in the process. The system is set to All. |
| Pay Grade | Type the three-digit pay grade to be included in the process. |
| Prior Yr Emp Date | Type a date in the MMDDYYYY format for the previous school year reemployment date. The system will select all employees who were hired on or before that date. If there is no reemployment date from the previous school year, the system will use the employee's original employment date. |
| Primary Campus | Click <input type="button" value="v"/> to select the three-digit primary campus to be included in the process. The system is set to All. |
| Pay Campus | Click <input type="button" value="v"/> to select the three-digit pay campus to be included in the process. The system is set to All. |
| Contract Begin Date | Click <input type="button" value="v"/> to select the exact contract begin date to be included in the process. |
| Contract End Date | Click <input type="button" value="v"/> to select the exact contract end date to be included in the process. |
| Contract Months | Type the contract months to be included in the process. |
| Payoff Date | Click <input type="button" value="v"/> to select the payoff date to be included in the process. |
| Payroll Freq | Click <input type="button" value="v"/> to select the one-digit payroll frequency to be included in the process. The system is set to the current logged-on payroll frequency. A specific payroll frequency must be selected; otherwise, no data displays. |

| Field | Description |
|-----------------------|---|
| Salary Concept | Click  to select the salary concept to be used in the process. The system is set to All. However, when calculating salaries, a specific salary concept must be selected (e.g., A - Use annual salary table, D - Use hourly/daily rate table, or M - Use mid-point table). If All is selected, the system will not perform salary calculations. |
| Extract ID | Click  to select a three-character, locally assigned code (e.g., En1 = English 1, AL2 = Algebra 2, HI4 = History 4) for grouping employees. The code is used to tag employee records for a batch process (e.g., copy or extract). Each employee must have the Extract ID set in the Employment Info tab before they can be selected using this function. |
| Employee Nbr | If you want to update data for only one employee, type the employee number, if known. If the employee number is not known or multiple employees are needed, click  to select employees. |

Under **Method**, select one of the following types of leave changes to implement:

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| Zero Leave Values for Employees | <p>A list of leave type codes and descriptions currently associated with the selected employees' records are displayed under Zero Leave Values for Employees. This type of leave adjustment is performed primarily at the end of the school year to prepare the leave balances for employees for the next year. Select Leave Earned for each leave type to change the leave earned value to zero, or leave blank not to affect the leave earned value.</p> <p>Select Leave Used for each leave type to change the leave used during the previous year to zero, or leave blank not to affect the leave used value. This allows you to calculate leave used for the coming year only.</p> <p>Select End Balance for each leave type to change the remaining balance for the leave type to zero. Use this option for a leave type if the balance is not carried forward from year to year (e.g., use it or lose it leave).</p> <p>If End Balance is selected, the system also selects Leave Used. The ending balance becomes zero and is carried forward as the beginning balance for the coming year.</p> <p>If End Balance is not selected, the remaining balance for the leave type is carried forward to the coming year (e.g., state leave). Leave balance is computed as the beginning balance plus leave earned minus leave used.</p> <p>Examples</p> |
| Add Leave Code to Employees | <p>Only active leave types from the Leave Type Description table can be added to the selected employees' records.</p> <p>Under Add Leave Code:</p> <p>In the New Code field, click  to select the leave code to be added.</p> <p>In the Begin Balance field, type the beginning balance of the hours of the leave type. You may type three digits to the right of the decimal point.</p> <p>In the Leave Used field, type the leave used for the leave type. You may type three digits to the right of the decimal point.</p> <p>In the Leave Earned field, type the leave earned for the leave type. You may type three digits to the right of the decimal point.</p> <p>In the Ending Balance field, the system displays the ending balance of the leave type.</p> |


| | |
|--|---|
| Delete Leave Code from Employees | <p>A list of leave type codes and descriptions currently associated with the selected employees' records is displayed under Delete Leave Code from Employees.</p> <p>Locate the leave codes to be deleted from employees' records.</p> <p>Select Delete for each leave code to be removed from employees' records.</p> |
| Increment Leave Earned to Employees | <p>A list of leave type codes and descriptions currently associated with the selected employees' records is displayed under Increment Leave Earned to Employees. Only active leave types can be selected. This type of leave adjustment enables the user to mass increment selected employees' records anytime during the school year without processing a payroll. For example, if several employees start employment after leave has been incremented through payroll processing, use the Increment Leave Earned to Employees option to select the specific employees and update their leave records.</p> <p>Select Leave Earned for each leave type to increment the leave amount, or leave blank not to affect the leave earned value.</p> <p>In the Increment field, type the increment amount for the selected leave type. You may type three digits to the right of the decimal point.</p> <p>Click Execute. If the maximum ending balance is exceeded, the Pre Update Error Listing report is displayed.</p> <p>Review the report.</p> <p>Review the report using the following buttons:</p> <p>Click  to go to the first page of the report.</p> <p>Click  to go back one page.</p> <p>Click  to go forward one page.</p> <p>Click  to go to the last page of the report.</p> <p>The report can be viewed and saved in various file formats.</p> <p>Click  to save and print the report in PDF format.</p> <p>Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.</p> <p>Click X to close the report window. Some reports may have a Close Report, Exit, or Cancel button instead.</p> <p>Click Continue to proceed to the Increment Leave Earned for Employees report, which displays the list of employees eligible to be incremented.</p> <p>If you click Continue, then the system displays the Increment Leave Earned to Employees list of changes for review.</p> <p>Click Cancel to return to the Leave tab without making the changes.</p> <p>Click X to close the Human Resources report window.</p> |

Click **Execute**. The system displays the report.


[Review the report.](#)

Review the report using the following buttons:


Click  to go to the first page of the report.


Click  to go back one page.

Click  to go forward one page.

Click  to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click  to save and print the report in PDF format.

Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.

Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Click **Process** to accept the changes and continue. If you click **Process**, you have the option to print parameter criteria.

- Click **Yes** to print the parameters selected for this update.
- Click **No** to continue.

A message displays asking if you would like to create a system backup. A backup is

[Create a backup.](#)

If you click **Yes**, a pop-up window is displayed with the **Frequency** and **Export File Name**. Click **Execute** to continue. Or, click **Cancel** to not create the backup and continue.

If you click **Execute** to create the system backup, a pop-up window is displayed prompting you to enter a password for the archive. Type the password and click **OK** or click **Cancel** to cancel the process. After the process is completed, the Save As window is displayed. Select the drive location to save a copy of the export.

Click **Save**. A message is displayed indicating whether or not the process was completed. Click **Yes** or **No** to either continue or end the process.

Other functions and features:

Click **Reset** to reset all previously selected parameter options to the default.

Click **Cancel** to close the Mass Update page.



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