Leave Traq Departmenal Leave Coordinators Quick Reference Guide

Instructions: This quick reference covers tasks you may encounter as a Leave Traq Departmental Leave Coordinator and provides step-by-step instructions for completing the tasks. If you have questions or need assistance, please contact the PVAMU Central Leave Coordinator at:

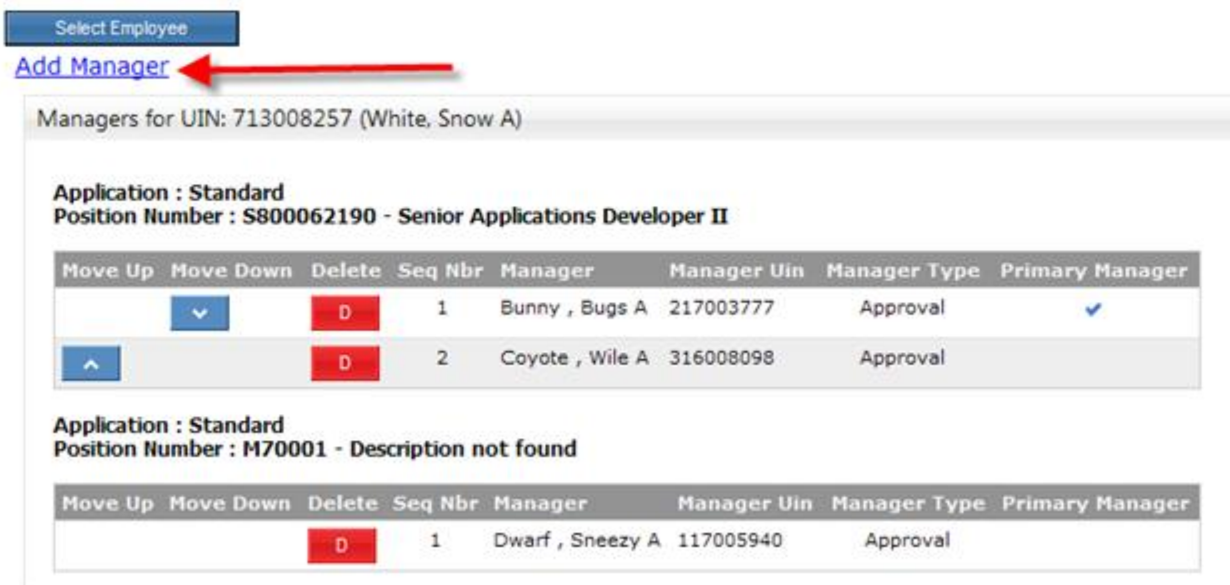
Email: kaspacek@pvamu.edu or leaveteam@pvamu.edu
Phone: 936-261-1728

Topics Covered

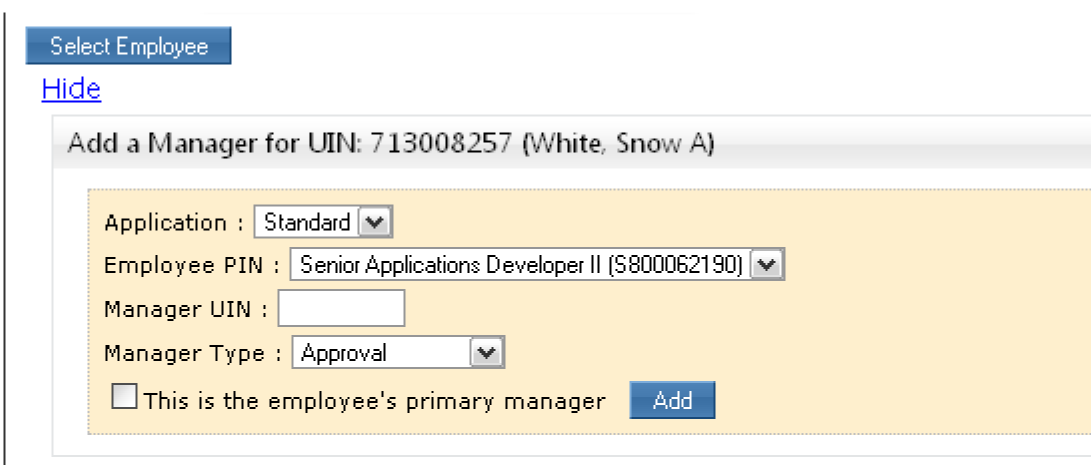
Topic #1 – Setting the Managerial Relationships

<u>Maintaining the employees Manager</u>

- Step 1: - Select the employee using the Search pop-up window or the employee list tab.
- You will see a screen similar to the one below. Note the deleting and re-ordering the managers is as it was before.



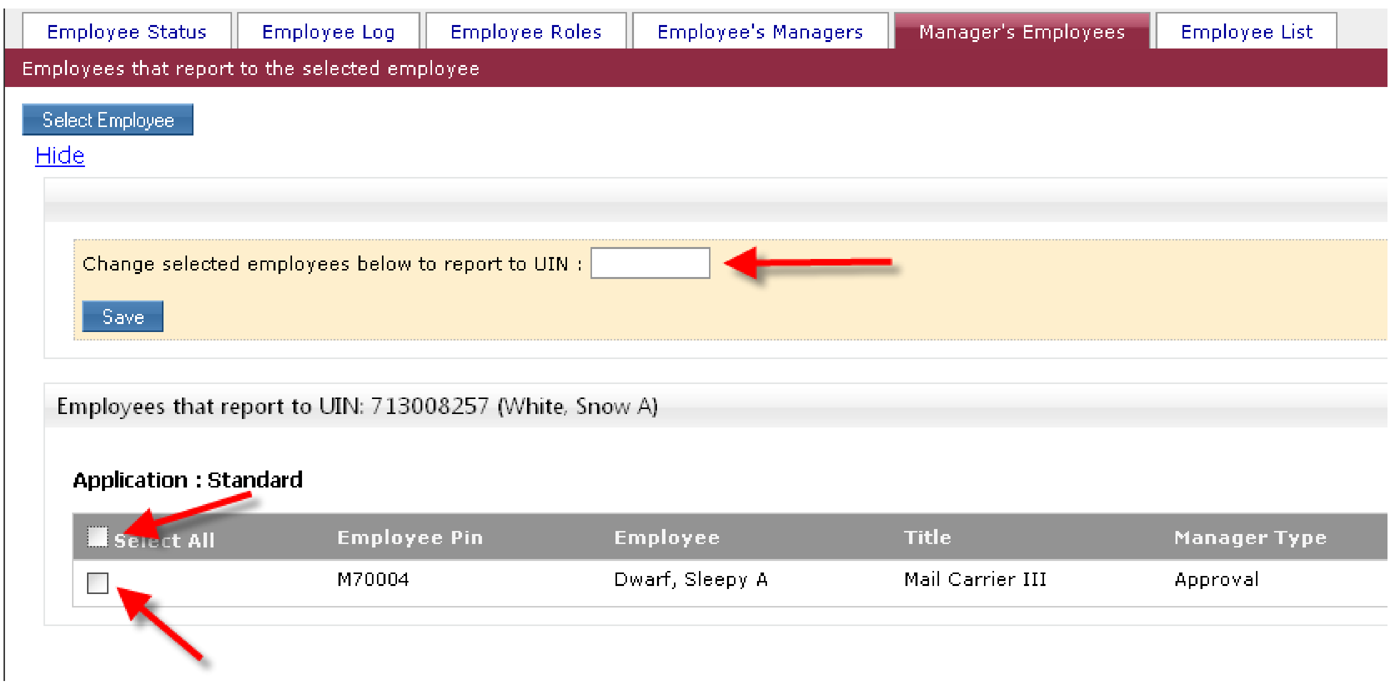
- To add a new manager for the employee, press the "Add Manager" link just under the Select Employee Button.
- The following screen section will appear:



This screen section will allow you to add a new manager for the employee.
· Select the application (standard or TimeTraq)
· Supply the manager's UIN.
· Select the Position (only if the employee is in multiple positions)

- Select the manager type.
    - Indicate the *Type of Manager* from the drop-down arrow by selecting from the following options:
    - *Approval* – responsible for approving/denying the employee's request, will receive an email indicating the employee has requested leave, is able to view the employee's leave information in Leave Traq
    - *Info Only* – will receive an email indicating the employee has requested leave, but is not responsible for approving/denying the leave and will not be able to view the employee's leave information in Leave Traq
    - *Reader* – able to view the employee's leave information in Leave Traq, but is not responsible for approving/denying the leave request and does not receive an email

- Mark the check box if this manager is the employees Primary manager
- Click the blue *Add Mgr* button to create the manager/employee relationship
- Additionally, an administrator can now move all (or selected) employees from one manager to another manager on a single screen.
- On the "Manager's employees screen, by pressing on the "Change Manager" link (just under the Select employee button) you will see the following. By checking the employees you wish to move to the new manager, and filling in the new managers UIN, you may move multiple employees at once to the new manager.



- **To make changes to <u>existing</u> managerial relationships:**
    - There are blue *up* and *down* arrows beside a manager's name which will allow you to change the approval order by clicking on the arrows.
    - To **<u>delete</u>** a manager, click on the red *'D'* beside the appropriate name.
    - Please note that Leave Traq has the capability of listing and setting the approval or notification order for up to ten Managers.

Topic #2 – Setting the Default Email Notification

So you may efficiently review leave requests as a manager/supervisor or Department Administrator, set your default email notification to *each document*.

- Click the *Change Role* drop-down arrow in the upper right-hand corner of the screen and select *Employee*.
- Click the *Profile* tab at the top of the screen.
- In the *Manager's Inbox* and *Administrative Inbox,* select the preference of *Each Document*.
- Click the blue *Save Notification/Email Changes* button. The phrase *Update Successful* will appear.
- Note: Since there are normally two Department Administrators responsible for administering Leave Traq within a department, you may wish to have only one of the Department Administrators receive email notification. This can be accomplished by selecting *No Notification* under the *Administrator Inbox*.

Topic #3 – Processing a Leave Request as the Department Administrator

- Click the *Change Role* drop-down arrow in the upper right-hand corner of the screen and select *Dept Admin.*
- Verify the correct Adloc – if you are the *Dept Admin* for more than one Adloc, click the blue *Change Adloc* button and select the appropriate Adloc.
- Click the *Pending Docs* tab at the top of the screen.
- Click on the blue *Document Number* button under the *Details* column, check for any documents with a *Status* of *Pend Adm Review* (this status indicates that the manager has already given his/her approval).
- Review the leave request under *Current Document Information*.
- Under *Document Actions*, click on the green *Review OK* button.
- You will then receive the prompt *Document Action Successful - Status Changed To Completed.*

Topic #4 – Requesting Leave for an Employee Using the Transaction Entry screen

If an employee is absent and unable to submit his/her leave document then the manager approves Leave Request form and submits the document(s) to the Leave Coordinator who will then submit the documents in the Leave Traq system for the employee. Leave documents can only be submitted on behalf of an employee if the employee is unable to do so. In a case where the leave document must be submitted on behalf of the employee this should be done on a weekly basis in order for timesheets to be approved. The Leave Traq System and Time Traq system should reflect the same information for the reporting period.

Leave Request document must be completed on behalf of the employee by the Budget Head and then given to the Departmental Leave Coordinator and then sent to the Office of Human Resources.

- Click the *Change Role* drop-down arrow in the upper right-hand corner of the screen and select *Dept Admin.*
- Click the *Transaction Entry* tab at the top of the screen.
- Type in the last name of the employee in the *Find Employee By Name* box and click the blue *Search* button. If more than one employee's name appears, select the appropriate employee and then click the blue *Search* button – this will automatically insert the employee's UIN.
- Verify the correct fiscal year.
- Click the drop-down arrow for the *Transaction Type* and select *Usage of Leave*.
- Click the drop-down arrow for the *Leave Type* and select the appropriate leave requested.
- Verify whether the leave is eligible as *FMLA*, *Parental Leave (PL)* or *Parent/Teacher Conference (PT)*.
- The *Start Date* and *End Date* will be the beginning and ending dates of the requested leave.
- Enter a *Description* for the leave being requested.
- Click the blue *Save* button. You will then receive the prompt *Transaction Successful*.

Topic #5 - Canceling an Employee's Leave Request

Canceling a leave document for an employee should only be done if the employee has requested the cancelation by printing the leave document, explaining the reason for cancellation, then signing and dating the document. The immediate supervisor will also need to sign and date before a cancellation can be performed.

- Click the *Change Role* drop-down arrow in the upper right-hand corner of the screen and select *Dept Admin.*
- Click *Employee List* tab at the top of the screen.
- Locate the name of the appropriate employee. If necessary, use the *Name Search* feature.
- Click on the *Select Employee* button next to the employee's name. The screen will show the employee's name and title in **bold** font at the top of the screen.
- Click on *Emp Documents* tab at the top of the screen.
- Click on the *Document ID* button for the leave that should be canceled.
- When canceling a document, you are required to add an *Action Comment* (e.g., "Correction, employee will resubmit").

- Click on the red *Cancel* box.
- A question box will appear asking if you are sure you want to take this action. Click on the *OK* option. You will then receive the prompt *Document Action Successful – Status Changed to Cancelled.*
- The employee will receive automatic email notification that their previously completed leave document has been canceled.
- If appropriate, the employee should submit a new leave request.
- Canceling a document is a final action on a document. No more actions can be took on a document after it has been cancelled. Canceling is normally used if the employee withdraws their request for leave or the leave is never take for some other reason.

Topic #6 – Creating a Report

- Click the *Change Role* drop-down arrow in the upper right-hand corner of the screen and select *Dept Admin*.
- Click the *Reports* tab at the top of the screen.
- Click the drop-down arrow and select the appropriate report.
- Verify the appropriate *Adloc*.
- Enter the required information for report requested.
- Click the blue Submit button and click *Open*.
- The selected report will automatically be generated.
