# Table of Contents

**How to Start Using a System** ........................................................................................................... 2  
Basic Information .................................................................................................................................... 2  
Levels of Access ....................................................................................................................................... 2  
Data ......................................................................................................................................................... 2  
Logging In ................................................................................................................................................ 2  

**Employee View** ............................................................................................................................... 3  
Submit Days ............................................................................................................................................ 3  
Absence Graph ......................................................................................................................................... 4  

**Getting Started – Manager View** .................................................................................................... 4  
Approve/Deny Requests ........................................................................................................................... 5  

**Setup Employees** ............................................................................................................................ 6-14  
Select Existing User ................................................................................................................................. 7  
Add New User .......................................................................................................................................... 7  
Initial Balances ........................................................................................................................................ 7  
Starting Date .......................................................................................................................................... 7  
Appointment Details ............................................................................................................................... 7  
Approvers ................................................................................................................................................. 8  
Appointments ........................................................................................................................................... 9  
Periodic Reporting ................................................................................................................................ 9  
FMLA Status .......................................................................................................................................... 11  
Allow Freeform Time Submission ........................................................................................................... 11  
Allow Weekend Submissions ................................................................................................................... 12  
Balance Adjustment ............................................................................................................................... 12  
Hide User ................................................................................................................................................ 12  
Starting Balances ................................................................................................................................. 13  
Banner Balances .................................................................................................................................... 13  
Event Detail ............................................................................................................................................. 14  

**Reports** .............................................................................................................................................. 14-15  
Submitting Time to Banner .................................................................................................................... 14
How to Start Using a System

If you are interested in using this application and do not currently have access, simply send an email to engrit-apps@illinois.edu. Please take a look at the application costs located at http://it.engineering.illinois.edu/services/portal-applications-engineering

A CFOP will be required before access can be granted. If you would like to test the application before purchasing, please indicate such in your email.

Basic Information

The Vacation & Sick Leave (VSL) application is available to help manage University leave benefits. VSL’s primary functions are to track the request/approval process and maintain balance information for University Vacation and Sick Leave benefits.

Levels of Access

There are three levels of access: Employees, Approvers, and HR Managers.

Data

Only the employee name is pulled from EDW. Although balances are listed for reference, the employee benefit time isn’t in the app until the Manager puts them in.

Logging In

You can access the application by going to your portal (https://my.yourportal.illinois.edu) and logging in with NetID and your Active Directory password. If there is a Vacation Sick Leave Reporting link, click on it to go to the application.

If there is no link listed, go directly to the application by typing the following URL into a browser http://my.yourportal.illinois.edu/vacation

If you get a permission denied error, please contact Engineering IT Share services support at engrit-apps@illinois.edu
Employee View

Submit Days
When you access the Vacation application on the employee side, you will be presented with a summary of benefit time that lists balances, accruals, and usage. Civil Service employees only see their most current available balances. You may view your balance through a specific date, or through the end of the academic year. This is helpful if you need how much time off you have available through a specific date. Also, you can click the link to “Display summary in days” versus hours (hours is the default).

Please note: There are many configurable options, based upon the details of your appointment, so some items in this document may differ from what you see in the application.

Within the app, there is a calendar to the left of the screen that will allow you to select a specific date and request that day off. Be sure to indicate the "type of day off", and "amount of time off" (you can choose a full or half day). There is a field available to enter a note on your time off request.

Upon submitting your time off request, your manager will need to log into the vacation application to approve your request. An employee can delete a time off request prior to their manager approving, after which, your manager would have to remove the request. You would need to do this in the event that the employee decided not to take the time off.

Before using the “Other” type of day off requests, you may want to access the “Useful Links” section to access the campus leave policy, staff handbook, accrual policy and reporting policy. This will ensure you are selecting the appropriate time off type based on the details of your appointment.

Click the “Return” link on the right of the application at any time to return to the main portal screen.
Absence Graph
This page allows you to view your time off requests, plotted in a graph format. Under the “collection” dropdown you can choose to view your absence graph, or if your manager has set this up for your department, you may be able to see the time off requests for your office or work group. This can assist an office manager ensure that critical functions aren’t left unattended. Under “range” there are several selections you may choose from the dropdown. Note the time off indicator key near the bottom of the page – so you can quickly view what types of time off requests you are viewing.

Getting Started – Manager View
If you set up your main portal page with the Vacation system module/portlet, you will automatically get a listing of requested days. You may choose to approve or deny from this page without going into the program itself. However, to delete a request, you must log into the program and follow the steps as outlined on the next page.
Approve/Deny Requests

To approve or deny requests click on the “My Employee” tab (see screenshot above). You will see a list of all employees for whom you are listed as approver. Click on the name of the employee to navigate to the Employee Details page where you will be able to approve/deny the pending leave usage requests. Denied requests allow the approver to enter an optional message for denial. This message will display in the “Note” column.

In the “Action” column you will see three options for each pending request.

- A - Approve
- D - Deny
- X - Delete

When you choose to delete, you will be asked to confirm or cancel.
Setup Employees tab

This form allows you to add new employees to the system. Enter the employee’s NetID, balance, and appointment information using this form. This and other information can be modified after they’ve been added to the system with the “Add User” button.

Open the VSL program, click on the “Setup employees” tab. Your screen should look like this:

Using the “Select Existing User” dropdown, choose an employee and you will see more setup options populate on the screen. Continue reading to review specific setup areas in detail.
Setup Employees (Sections A-E)

A - Select Existing User
This section allows you to select an existing user in order to edit the user settings.

B - Add New User
This section is where you begin to enter a new employee. It is important to note that you must enter the Network ID for the employee, not the employee's name, UIN, or email address.

C - Initial Balances
This section allows one field for each type of time off. For the “Sick” field, use the amount of accrued non-compensable SICK hours as of your selected Starting Date. For the Comp field, use accrued compensable sick leave (SICC).

Notes for entering Civil Service Employees:
Initial balances need not be entered. The default 0, 0, 0, 16 should be used.

D - Starting Date
This should be the date the employee started using the VSL application. For existing employees it is typically the start of an Academic Year. For new hires it is typically their employment starting date.

E - Appointment Details
In the “%FTE” box enter the percentage of full-time the employee will be working. This should be entered as a numeral. For example, a full-time employee would be 100. A half-time employee would be 50.

In the Period box, select the term over which benefits accrue; this will be either 9 months or 12 months.
In the “Unit” box, select the department for which you are entering this employee. Some managers may have permissions to enter employees for several departments.

Three leave accrual types are listed for which employees may qualify. Choose the benefit type(s) for the employee. VAC= vacation, SICK= non-compensable, accruable sick leave, SICN= non-compensable, non-accruable sick leave. When you are finished entering your information, click on “Add User”.

**Notes for entering Civil Service Employees:**
Make sure the VAC, SICK, and SICN check boxes are Unchecked. Note: Although EDW data is refreshed daily, Banner only updates after payroll, so accrued benefit balances won’t change except once every two weeks.

**Setup Employees (Sections F-H)**

**F – Approvers**
In this section you may enter anyone who approves time submitted by an employee. You may enter as many approvers as necessary. They must be entered one-at-a-time. Use the approver’s NetID. Click on “Add”. Employees with no listed approvers will have their requests automatically recorded as “Approved.”
G - Appointments
This section allows you to specify details about an employee’s appointment as well as enter appointment changes. The data you enter here is used to properly calculate benefit accruals. Should it be necessary, you can also delete listed appointments by clicking the “X” in the upper right corner of this table. The appointments are to be a sum of appointments as you cannot enter concurrent appointments into VSL separately. Once appointment is considered “effective” at a time for accrual calculations.

H – Periodic Reporting
Here you can specify that an employee must indicate that their submission(s) for a given period is complete and accurate. The quarters are defined as follows:

- Q1 - 8/16 to 11/15
- Q2 - 11/16 to 2/15
- Q3 - 2/16 to 5/15
- Q4 - 5/16 to 8/15

The ends of quarters 3 and 4 correspond to the required university reporting periods in May and August. Some units may wish to have their employees finalize only at the designated university reporting times. Others may want to have employees sign their benefit submissions every quarter. For faculty (generally 9 month appointees) you may wish to select only Q3.

Once you have set your options in this section, click on “Set Reporting Options”.

Additionally, you may optionally enable a reminder e-mail for each employee. This will be sent if there are any required reporting periods that have ended which have not been signed and submitted. This e-mail will be sent daily until the reporting period in question is submitted.

When a period with a required reporting box checked ends, users will see a summary table appear in the Vacation System portal showing a summary of benefits used during the period just ended (see figure below for portlet view). When logged into the application your page will resemble figure 4 on page 10.
When users click on the link, “Finalize submissions for this period”, they will be shown one of two buttons: No Time Used or Finalize Period. They also have the option to click and report additional time used before submitting. (Figures 2 and 3) **NOTE:** When an employee clicks one of these buttons, the reporting period is locked and no additional changes can be made. As manager, you can unlock these. This will be discussed later.

When a reporting period is finalized and submitted by an employee, an e-mail containing the detailed benefit time use is sent to the employee's listed approver(s) asking them to discuss any potential discrepancies with the employee and the HR office.

*Figure 4*
I – FMLA Status

Set this to “Yes” to enable an option on the submit days page that allows employees to indicate that a given day is being submitted as part of an FMLA agreement. When finished, click on “Set FMLA”. Freeform (J) is also recommended for those currently approved for FMLA.

J – Allow Freeform Time Submission

By default, the system calculates the number of hours of benefit time to deduct for full and half day absences using a uniform five-day work week. However, some employees work non-uniform schedules. For example, a full-time employee may work four 10-hour days, or a 60% FTE may work three 8-hour days per week. In both instances the default calculations would result in the wrong amount of time being deducted from a balance. This option is ideal for Civil Service employees.
Given the variety of possible situations, it is impossible to create separate options for each. Instead, by allowing the freeform time submission, those users may submit the number of hours they are taking by entering a decimal number rather than a full or half day. To enable this option for an employee, choose “Yes” from the drop-down menu and then select “Set Freeform”.

**Notes for entering Civil Service Employees:**
For Non-exempt employees change the Allow Freeform Time Submission to “Yes”. This will allow for entering time to the nearest tenth of an hour.

**K – Allow Weekend Submissions**

By default the calendar that the employee sees for submitting days is M-F only. There are employees who work weekends as well. To enable those employees to see the whole week, select “yes” from the drop down and then hit “Set Weekend”.

**L – Balance Adjustment**

Use this section to deduct donations to the shared benefit pool or correct other discrepancies. When finished, click on Adjust.

**M – Hide User**

When an employee leaves your unit, at some point you will probably want to remove him/her from view within your vacation system. The “Hide User” button allows you to do this. By using this option, none of the benefit use, approvals, or appointment data is actually removed from the system. The user is just hidden from view.
**Setup Employees (Sections N-P)**

**N – Starting Balances (Aug-16)**

In this section is displayed historical balances. The “L” and “U” stand for locked and unlocked. Each required quarter of reporting (Q1, Q2, Q3, and Q4) will lock automatically when an employee submits all required reporting for that period. You can change from locked to unlocked, or vice versa by clicking on the letter.

The “B” column allows you to lock or unlock starting balances for the academic year. Starting balances that aren't locked are automatically calculated using accruals based on appointment type, %FTE, and benefits use. The starting balance is automatically locked when an employee submits all required reporting periods for the previous academic year.

Clicking on a number in the year column allows you to select a year for display in the “Event Detail” section of the employee setup page. Each individual submission of benefit time for the selected year will be displayed.

**Please note:** If you need to correct an employee's starting balances, you can do so by re-entering them as if he/she were a new user. Just re-enter the employee with the same starting information and correct balances. Be certain to use the employee's NetID when updating starting balances.

**O – Banner Balances (Aug-16)**

This section shows the beginning-of-period balances as recorded in Banner or the Enterprise Data Warehouse (EDW). You can compare these with the balances displayed in the Starting Balances table. If you need to transfer the Banner numbers in the Starting Balances table for a given year, you may do so by clicking the “R” link on the row for the balances you want to import. Please note that floating holiday balances are not affected by this process as Banner does not track these days.
P - Event Detail

This section shows you a listing of requested time off. Here you will see each date requested, the number of hours, the type of request, notes, and status of the request. For the status you will see “P” for pending, “A” for approved, “D” for denied, or “U” for unconfirmed.

Reports

Usage Summary

This page was designed to handle University reporting requirements. It breaks down the total time off reported for each employee (for all quarters), and allows Banner submission for specific AY reporting periods. Note that you can only submit time to Banner for the AY appropriate for the current reporting period; the button will be disabled otherwise. Continue reading below for more specifics on the Banner submission process.

Submitting Time to Banner

In the screenshot below, you will notice that the right-most three columns have to deal with the submissions to Banner (PEALEAV) as we only submit approved leave. During an appropriate reporting period there will be checkboxes for employees not configured as Civil Service. If there are outstanding, pending/unconfirmed entries the summary will display an orange background, since the amount that we will submit does not match the amount requested.

When all (or any) employees are ready to be reported, simply check the box in their row, select the appropriate “Available Date” and “Change Reason” (located at the bottom of the page), and click the “Submit to Banner” button. Upon doing so, the interface will display a spinner while the submissions are going through, and come back with a green check if OK, or will display errors if there were any issues with the submission.

When this page loads during a reporting period, the system checks Banner to see if the values match what we show for usage in VSL. All employees should be submitted at least once during each reporting period, even if the numbers confirm a match. If someone’s leave has already been submitted, and now shows a yellow warning triangle, the values may have been updated and need to be re-submitted to update the values in Banner.
Quarterly Reports

The Quarterly Reports page tracks periodic reporting that is due. Anyone who is required to report will display on this screen until they do so, and once the employee finalizes their period they will come off the list. This is a handy tool to track employees who have not reported. Note that you may copy and paste the information into excel.

### Quarterly Usage

This report displays employees’ information such as Unit, FTE status, start date, benefit totals at the start and end of each quarter. This report can be exported to excel, but keep in mind that it’s broken out by quarter. Filtering options are available for changing period beginning, length and unit (for those who have multiple).