



Texas Skyward User Group Conference

Time Off Advanced Options

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Learn additional ways to get the most out of the Time Off module.

- Time Off default codes
- The Probation Utility - a Probation Date field can now appear on Time Off Setup records. A utility is available that will check the 'Display on checks and in Employee Access' flag on Time Off Setup records when the Probation Date is prior to the date the utility is run.
- Time Off Mass Change Unit Type by Group - Explanation of how to change the unit type from hours to days or days to hours.
- Time Off Year End Purge and Rollover - Discuss the preparation for the Year End Purge and Rollover, and show how to run this option.

Time Off Default Codes

Time Off Defaults Setup - WH\TO\PS\CF\TD - 9648 - 05.15.06.00.03 - Internet Explorer

Time Off Defaults Setup

Views: **General** Filters: ***Skyward Default**

TO Default Code	Description	Group 1 Unit Type	Group 2 Unit Type	Group 3 Unit Type	Group 9 Unit Type
Paras	Paras	Hours	Hours	Hours	Hours
Teachers	Teachers	Days	Days	Days	Days

Expand All Collapse All Modify Details (displaying 3 of 3) View Printable Details

Assigned Time Off Codes Add Time Off code

Time Off	Units	G	A	C/EA	LTD	FMLA	H/D	Roll	Reason	AA	Allotment	S D	OUA	OMU
E D ILLD	D	1	Y	Y			8	ROL	BEG	Y	TEA-SICK	H	0	0
E D VACD	D	1	Y	Y			8	L	LOS	Y	VACATION	H	0	0

Employee Types with TO Default Code Select Employee Types

(Employee Type code will determine what Time Off Defaults to assign to the employee when adding profiles & when assigning time off using the Default button on tab - each employee type can only be assigned to one TO Default)

Code	Description
TEA	TEACHER

Assignment Codes with TO Default Code Select Assignments

(Assignment code will determine what Time Off Defaults to assign to the employee when importing from Employee Management into Payroll - each assignment code assigned to one TO Default)

Description	Code
D1 GRADE	

Time Off Default – group setup

Edit Time Off Default Setup Code - WH10\PS\CR\TD - 9648 - 05.15.06.00.03 - Internet Explorer

Edit Time Off Default Setup Code

Default Employee Time Off Setup

* Time Off: VACATION DAYS Units: Days Group: 1

Active
 Display on checks and in Employee Access
 Currently on long-term disability leave ?
 FMLA ?

* Hours Per Day: EIGHT HR/DAY 8

* Roll Disposition: LOSE L

* Reason Code at Roll: LOSE, NOT USED BY END OF YEAR LOS Desc

Auto Accrual Setup

Use Auto Accrual

Allotment Code: VACATION VACATION

Start Date:
 Use Profile Hire Date; if not available will use Today's Date
 Use Profile Start Date; if not available will use Today's Date
 Use Today's Date

Override Auto Units: 0.0000

Override Maximum Units: 0.0000

Years to Add at Anniversary: 0.00

Auto Allotment Reason: ANNUAL ALLOTTME ALL Desc

Asterisk (*) denotes a required field

100%

Probation Utility - setup

Time Off Setup Information (Edit) - WH\EP\TB\TISE - 30523 - 05.15.06.00.03 - Internet Explorer

Time Off Setup Information (Edit)

Employee: GRYDEBOB000 Gryderscr, Bobbie E Save Back

Time Off Setup

Time Off: PRL PERSONAL DAYS Type: Hours Group: 1

Active
 Display on checks and in Employee Access
 Probation Date: 10/30/2015

* Hours/Day: 7 SEVEN HR/DAY
 * Roll Code: ROL ROLL
 * Reason Code: BAL BEGINNING BALAN

Use auto accrual

Start
 End
 Allotment
 Override Auto
 Override Maximum
 Years of Service
 Years to Add at Anniversary: 0.00
 Next Anniversary Date: 07/01/2002
 Auto Allocate Reason: BAL BEGINNING BALAN

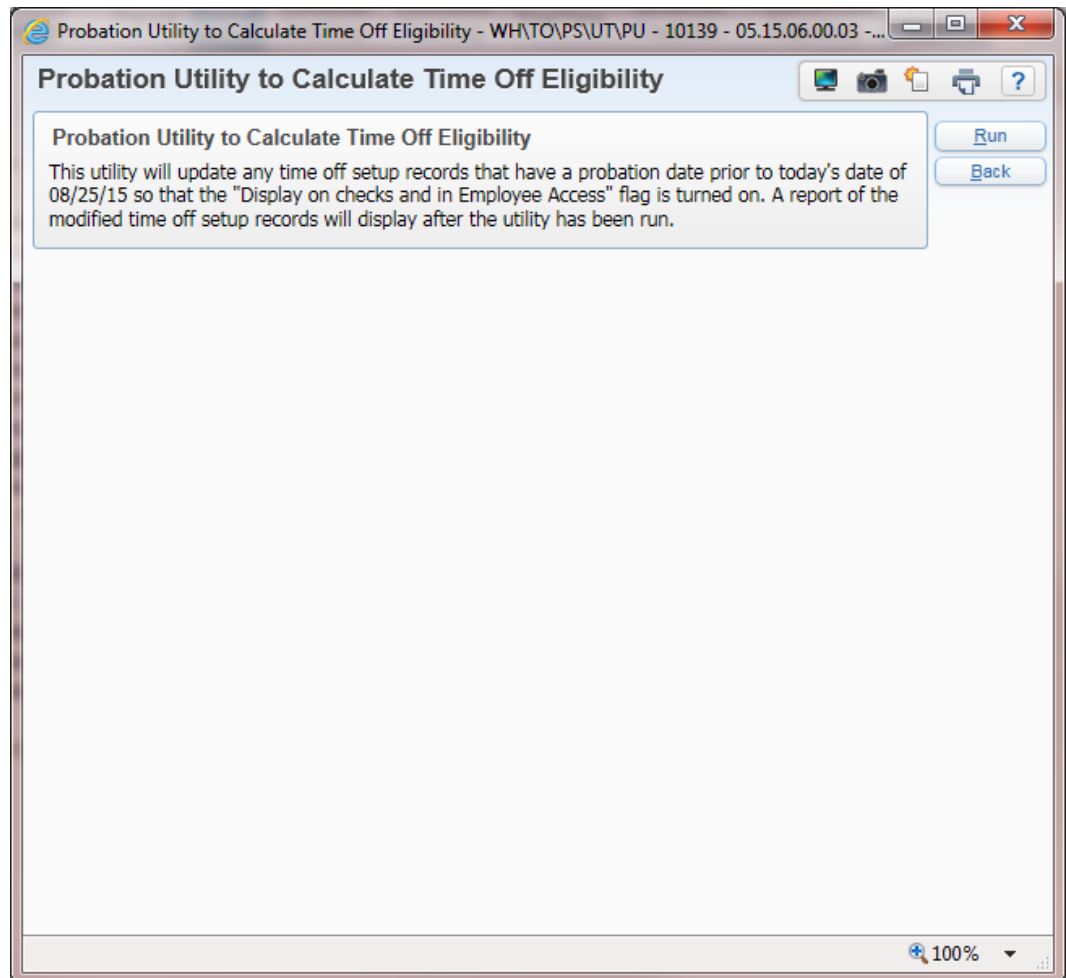
Probation Date Description

*The time off Code will be available for use once the employee has completed their probationary period. This Date will be the Date that is used to allow the time off code to be used. A utility is available that will update the 'Display on checks and in employee access' flag to be turned on after the probationary date has passed.

OK

Asterisk (*) denotes a required field

Probation Utility



Mass Change Unit Type

Unit Type By Group Mass Change - WH\TO\PS\UT\UT - 30616 - 05.15.06.00.03 - Internet Explorer

Unit Type By Group Mass Change

Template Settings

* Template Description:

Share with other users in the district

This utility allows you to convert your current time off group, setup, and detail transactions values from hours to days or days to hours within a specified time off group. You must convert all of the time off codes within that group. You can limit the people you are converting using the selection parameters.
 Prior to running this conversion, you should verify that your Hours Per Day codes have the correct amount entered. The amount entered will be used to convert hours to days or days to hours. For example, a daily time off code with a 7.5 hours per day amount will convert to 7.5 hours during this process.
 Note: Time off Default codes will NOT be updated, you must manually update them.

Step 1: Verify

[Verify Hours Per Day codes and amounts:](#)

Step 2: Parameters

Type of conversion: Days to Hours Hours to Days

When converting the detail time off transaction amounts, use the employee time off setup hours per day amount, not the detail time off transaction hours per day amount.

Time off group to convert: 1 - PERSONAL 2 - SICK 3 - VACATION 9 - NOT ON STUB

	Old TO Code	Old TO Code Desc	New TO Code	New TO Code Desc
Select New Codes:	ILLD	ILLNESS DAYS		
	PER	PERSONAL		
	VACD	VACATION DAYS		
	VAD	VACATION DAY		

* Selection Parameters: Default Parameters

Asterisk (*) denotes a required field



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THANK YOU FOR ATTENDING!

