This work instruction was last updated: 27th May 2010

Using ResourceLink to record annual leave

This Work Instruction explains how to record annual leave within ResourceLink.

Related work instructions include:

- Introduction to ResourceLink & Cognos reports
- Using ResourceLink to record sickness absence
- Using ResourceLink to record other absence (i.e. absence which is not leave or sickness)

Please also refer to the Estates & Facilities internal annual leave procedure, which details the whole process of how annual leave should be requested and recorded (including non-system aspects such as the use of paper leave cards).

1 .....Brief overview of ResourceLink, MyView (web-based self service) & Cognos reports

2 .....The Employee Absence Details screen

3 .....The Employee Absence Calendar screen

4 .....Using the Cognos Employee Work Pattern report to check an employee's start and end times

1 Brief overview of ResourceLink, MyView (web-based self service) & Cognos reports

ResourceLink

ResourceLink is the University's core HR & Payroll system. It runs off software installed on your pc and is used by approximately 120 people day-by-day at the University. ResourceLink holds all HR and Payroll information and also feeds other systems across the University.

MyView

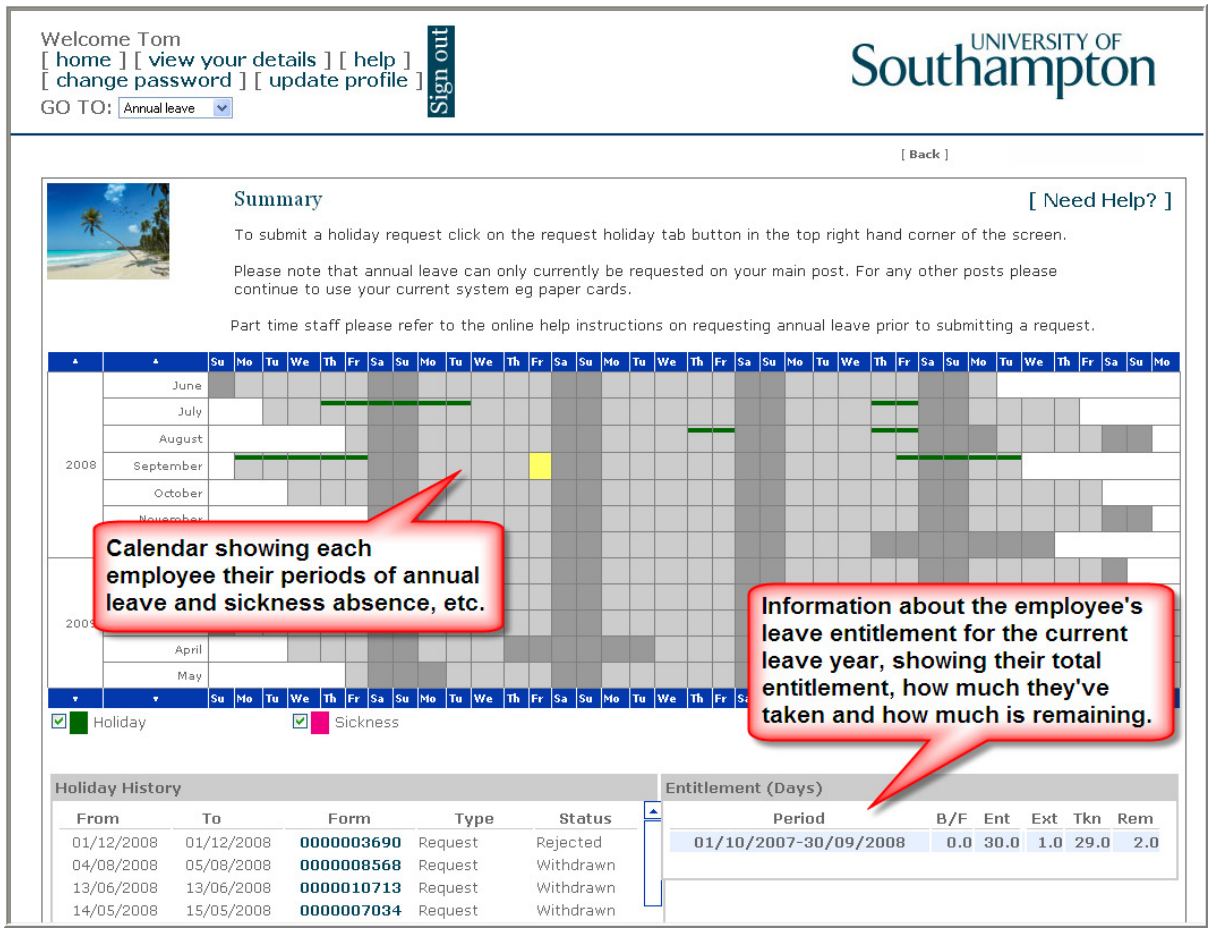
MyView is the self-service front-end of ResourceLink. It is accessed through a web browser (i.e. no additional software needs to be installed). By using MyView staff can view various details about their employment, amend some of their personal details, view and print their payslips and carry out other HR functions.

Cognos

Cognos is a reporting tool which the University uses to run all of its HR, Payroll, sickness and Management Information reports. Cognos is also accessed through a web browser (i.e. no additional software needs to be installed). The number of reports available to a user will depend on their profile and School / Department.

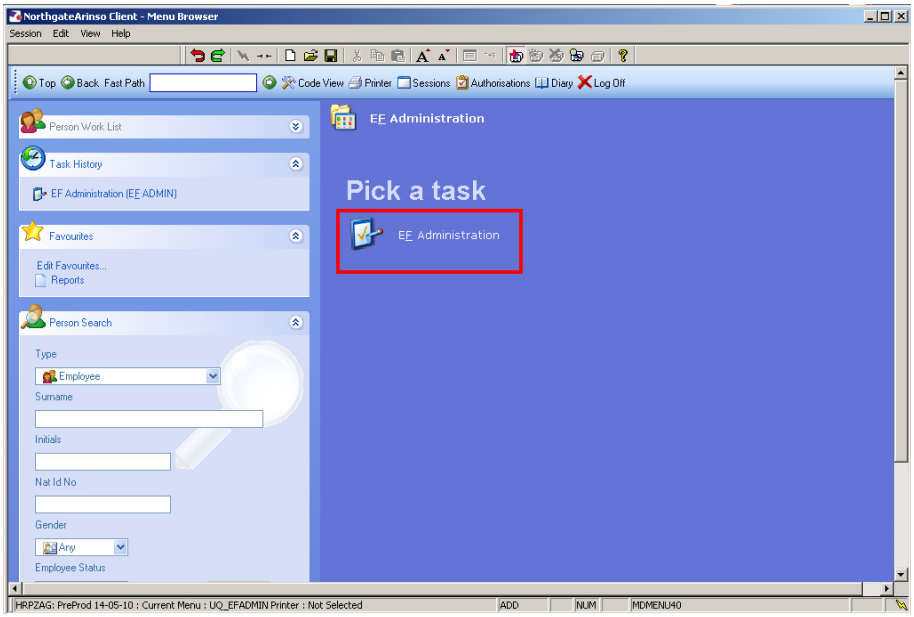
Points to note:

- ⓘ As of September 2008 all staff on permanent or fixed-term contracts at the University have access to MyView (the self-service part of the HR system).
- ⓘ As Estates & Facilities administrators you will be recording periods of annual leave, sickness absence and other absence for Estates & Facilities staff by entering these periods into ResourceLink (full step-by-step instructions are given in these work instructions).
- ⓘ The periods of sickness absence that you enter can affect an employee's pay – such as where someone on long-term sickness goes down to half pay.
- ⓘ The periods of annual leave, sickness absence and other absence that you enter will be visible to the individuals when they log in to MyView – see the example screenshot below of what a user can see when they log in to MyView:


Welcome Tom
[home] [view your details] [help]
[change password] [update profile]
GO TO: Annual leave
Sign out
UNIVERSITY OF Southampton
[Back]
Summary
[Need Help?]
To submit a holiday request click on the request holiday tab button in the top right hand corner of the screen.
Please note that annual leave can only currently be requested on your main post. For any other posts please continue to use your current system eg paper cards.
Part time staff please refer to the online help instructions on requesting annual leave prior to submitting a request.
Calendar showing each employee their periods of annual leave and sickness absence, etc.
Information about the employee's leave entitlement for the current leave year, showing their total entitlement, how much they've taken and how much is remaining.
Holiday
Sickness
Holiday History
From To Form Type Status
01/12/2008 01/12/2008 0000003690 Request Rejected
04/08/2008 05/08/2008 0000008568 Request Withdrawn
13/06/2008 13/06/2008 0000010713 Request Withdrawn
14/05/2008 15/05/2008 0000007034 Request Withdrawn
Entitlement (Days)
Period B/F Ent Ext Tkn Rem
01/10/2007-30/09/2008 0.0 30.0 1.0 29.0 2.0

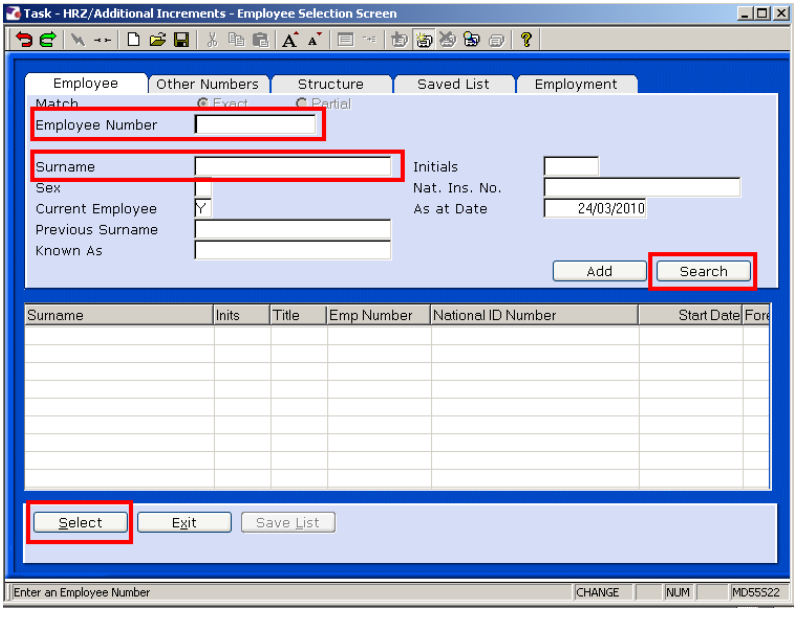
2 The Employee Absence Details screen

2.1 Once logged in to ResourceLink, click on the **EF Administration** task.



2.2 A pop-up window will appear as shown below:

2.3 The following search form is made available



2.4 The Employee Number, Surname, search and select options are highlighted

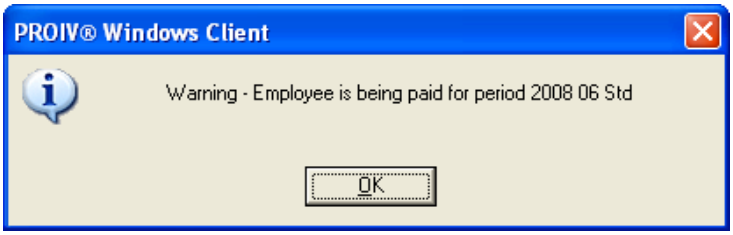
2.5 Entering either the Employee Number or Surname select search.

2.6 Select the appropriate staff member from the list

ⓘ You will only have access to records of staff working in Estates & Facilities.

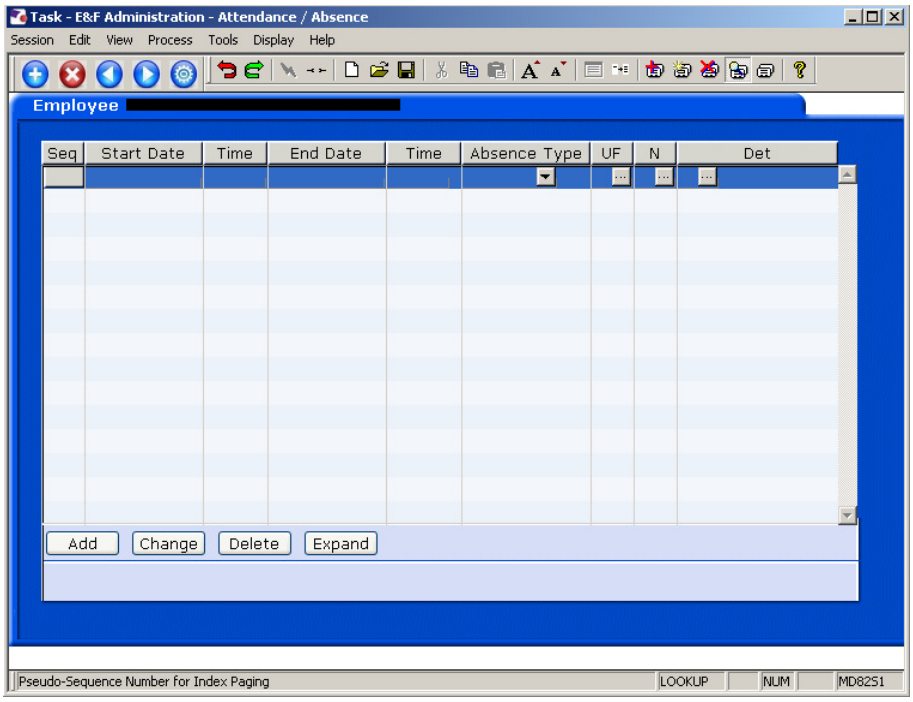
ⓘ If you enter a surname, which more than one Estates & Facilities staff member holds, then the following screen will appear, whereupon you simply click on the record you are interested in and then click on the **Select** button:

💣 You may get the following information pop-up message if/when Payroll are processing pay – just click on the **OK** button to continue:



2.7 The **Absence Details** screen will now open, showing any absence details for the person you have selected.

ⓘ This screen will show a row for each annual leave request, each period of sickness absence or any other period of other absence that the person has had. Therefore each employee's **Absence Details** screen will show more and more information over time.



2.8 Click on the **Add** button to add a new row of annual leave.

2.9 In the **Start Date** field, enter the start date of the holiday period.

💣 All dates must be entered in the format: **ddmmyy** (you do not need to input the forward slashes – the system will add these in).

ⓘ For example: if someone's leave card has the period: Mon 8th Sept 2008 to Wed 10th Sept 2008 you would enter **080908** in the **Start Date** field.

2.10 Once you have input the start date, press **Tab** or **Return** on your keyboard to move into the **Time** field. The system will then add the default start time from the person's work pattern – however you can overwrite this if necessary.

Explaining work patterns on ResourceLink:

1) All work patterns use a 24 hours clock (i.e. 4pm must be entered as **16:00**)

2) For consistency and ease of maintenance, all work patterns at the University have been set up to start at 09:00, regardless of when a person actually happens to start their day. (The only exceptions are security staff who work nights.)

3) All work patterns where someone works more than 4 hours in a day have a one hour lunch break in them.

💣 If you are entering annual leave for a member of the security team (or anyone else who works nights) you will need to check their work pattern start hours, using the Work Pattern Lookup report. See Section 4 below.

Examples of what start and end times to enter for part time staff who have requested annual leave:

a) Someone who works 1 hour = start time: 09:00 end time: 10:00

b) Someone who works 2 hours = start time: 09:00 end time: 11:00

c) Someone who works 3 hours = start time: 09:00 end time: 12:00

d) Someone who works 4 hours exactly = start time: 09:00 end time: 13:00

e) Someone who works 4 hours and 1 minute = start time: 09:00 end time: 14:01
(the system sees them as working 09:00-12:00 and 13:00-14:01 with a one hour lunch break)

f) Someone who works 5 hours = start time of 09:00 and end time of 15:00
(the system sees them as working 09:00-12:00 and 13:00-15:00 with a one hour lunch break)

g) Someone who works 6 hours = start time of 09:00 and end time of 16:00
(the system sees them as working 09:00-12:00 and 13:00-16:00 with a one hour lunch break)

h) Someone who works 7 hours = start time of 09:00 and end time of 17:00
(the system sees them as working 09:00-12:00 and 13:00-17:00 with a one hour lunch break)

i) Someone who works 8 hours = start time of 09:00 and end time of 18:00
(the system sees them as working 09:00-12:00 and 13:00-18:00 with a one hour lunch break)

2.11 Press **Tab** or **Return** on your keyboard to move into the **End Date** field.

2.12 Enter the end date of the leave period (using the format **ddmmyy**).

- In the example where someone was requesting leave for the period: Mon 8th Sept 2008 to Wed 10th Sept 2008 you would enter 080908 in the Start Date field and 100908 in the End Date field.

- If the person is just having one day off as leave, then the date you enter in the End Date will field will be the same as what you entered in the Start Date field.

2.13 Press **Tab** or **Return** on your keyboard to move into the second **Time** field.

2.14 Again, the system will automatically add the default end time from the person's work pattern – however you can overwrite this if necessary.

- For example, if someone who works full time only want to take half a day off, you will keep the start time of 09:00 but overwrite the end date (which will appear as 17:00 when you tab into the **Time** field) to 13:30.

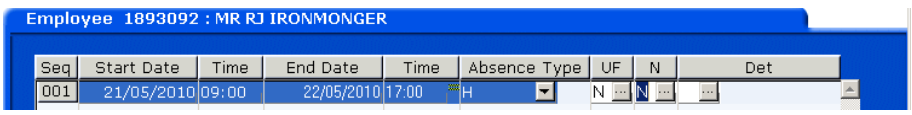
- Entering a start time of 09:00 and an end time of13:30 will result in the system deducting 0.5 days from a full time employee's leave entitlement.

2.15 Press **Tab** or **Return** on your keyboard to move into the **Absence Type** field.

2.16 Use the drop-down list to select the relevant absence type, which for annual leave is: **H - Holiday**

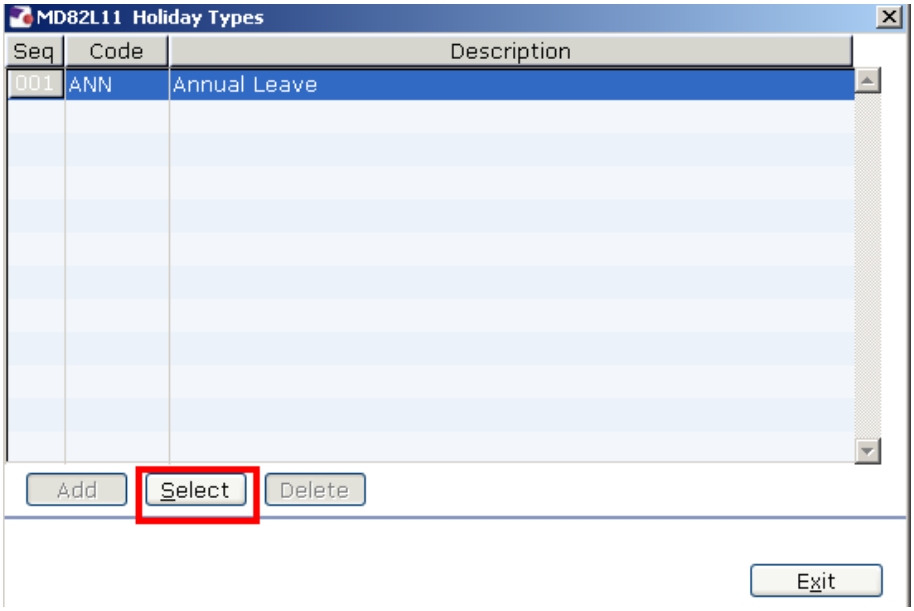
Code	Desc	Long Description
A	Absence	Absence
B	SPP(Birth)	Statutory Paternity Pay (Birth)
C	SPP(Adopt)	Statutory Paternity Pay (Adoption)
D	Adoption	Statutory Adoption Pay
H	Holiday	Holiday
M	Maternity	Maternity
N	N-Std Work	Non-Standard Work
P	Auth Abs	Authorised (Permitted) Absence

2.17 The screen will look similar to the example below (although the record you are using may have many more rows in it):



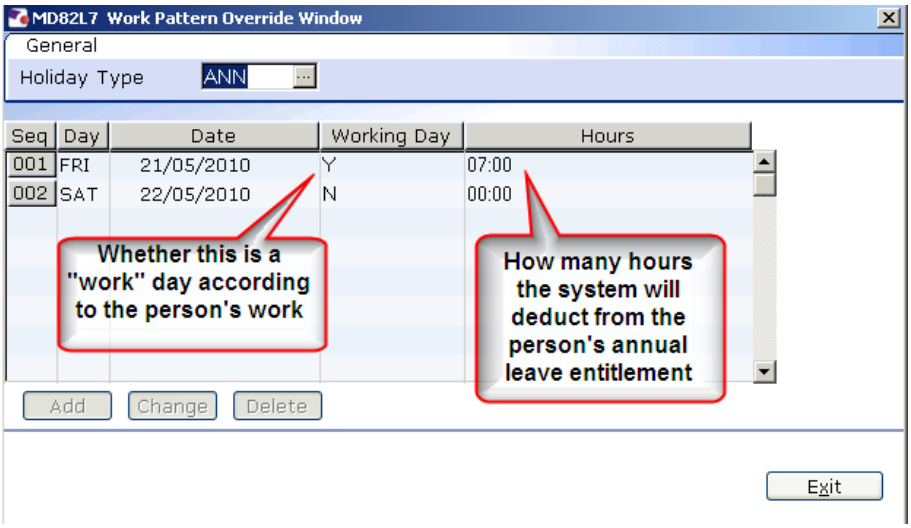
2.18 Press **Tab** or **Return** on your keyboard – a pop-up window will appear:

2.19 Click on the small grey button … to reveal a further pop-up window:



2.20 Annual Leave is the only option available, so simply click on the **Select** button.

2.21 Press **Tab** or **Return** on your keyboard. You will then see the following screen (with information relevant to what you have just entered):

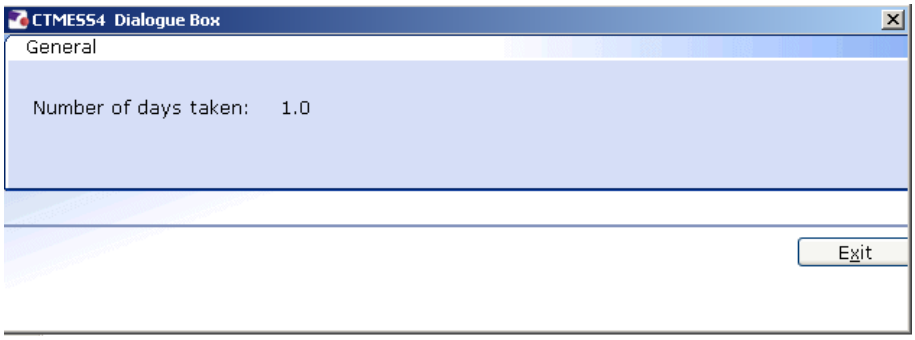


Note: if under the "Hours" column it reads "0" hours and you were expecting that day to be one of the employee's working days then there is a problem, as this will not deduct anything from the person's leave entitlement. The

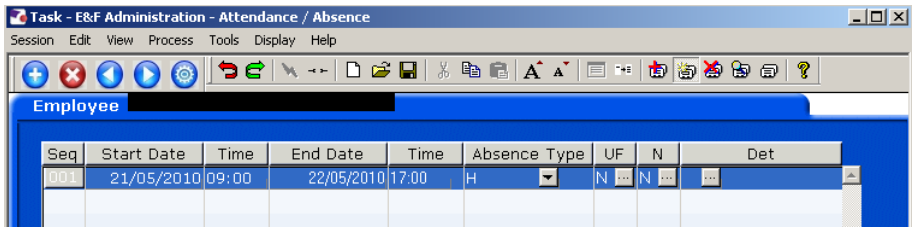
most likely cause is that you have entered a day of the week when the person does not work.

2.22 Click on the **Exit** button.

2.23 The following summary screen will appear, confirming how many hours (for a part-time member of staff) or days (for a full-time member of staff) will be deducted from their annual leave entitlement:



2.24 Click on the **Exit** button to be taken back to the main **Absence Details** screen:



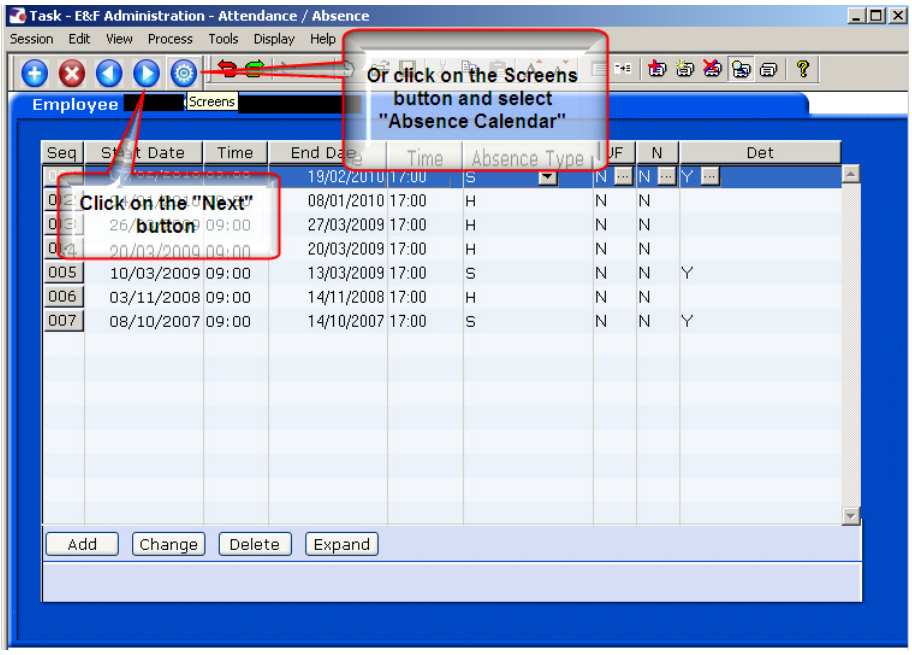
You have now recorded the period of annual leave for the person. The information will now appear on their leave calendar within MyView.

If you ever want to check the details of how many hours the system is deducting you can click on the **"Det"** button (short for details).

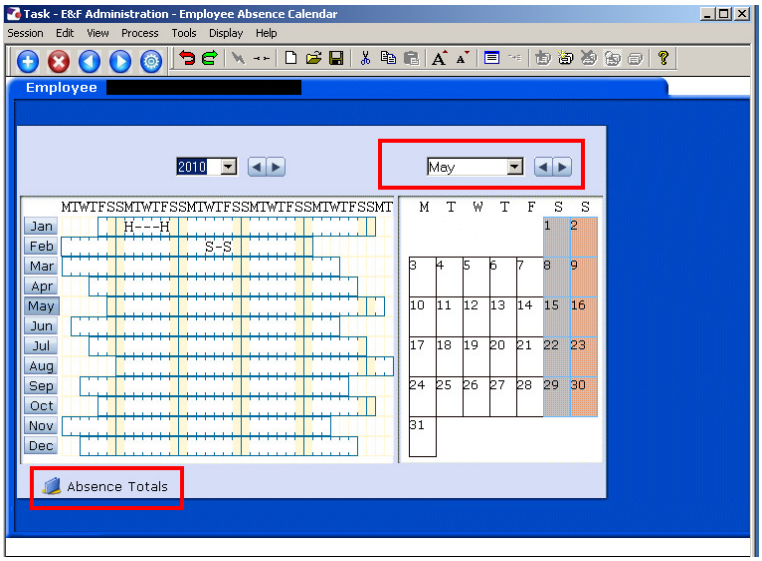
3 The Employee Absence Calendar screen

The Employee Absence Calendar screen is for information only. You do not need to enter anything on this screen. It simply provides an alternate way of viewing absence details for an employee.

3.1 Once you are in someone's record, to view the Absence Calendar screen simply click on the tab at the top of the window or click on the "Next" button on the left-hand scroll bar:

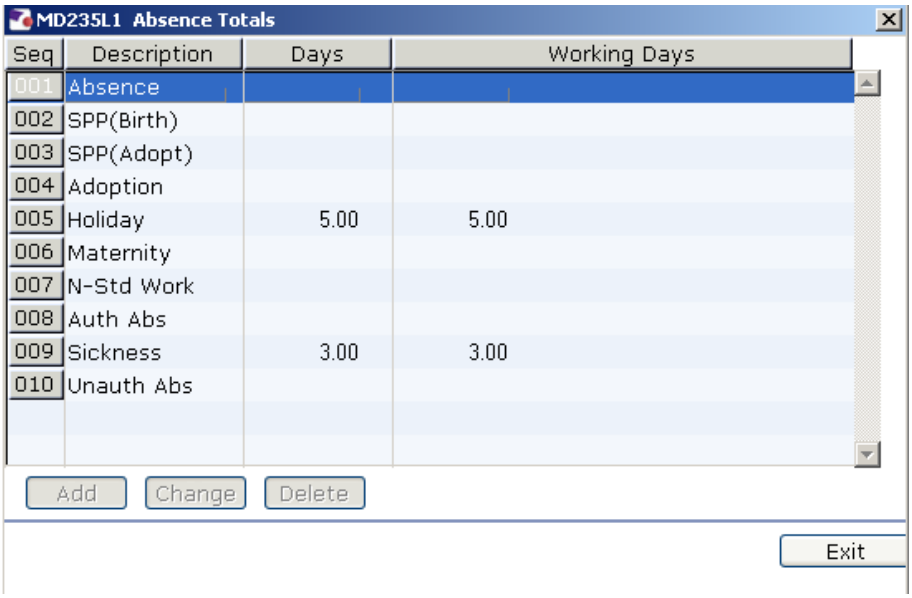


3.2 You will then see the following screen:



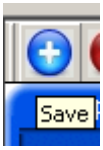
3.3 It will default to show the current month but you can click on any month to see the details.

3.4 If you click on the **Absence Totals** button it will list the total number of working days that the employee has been absent (by type) for that month:



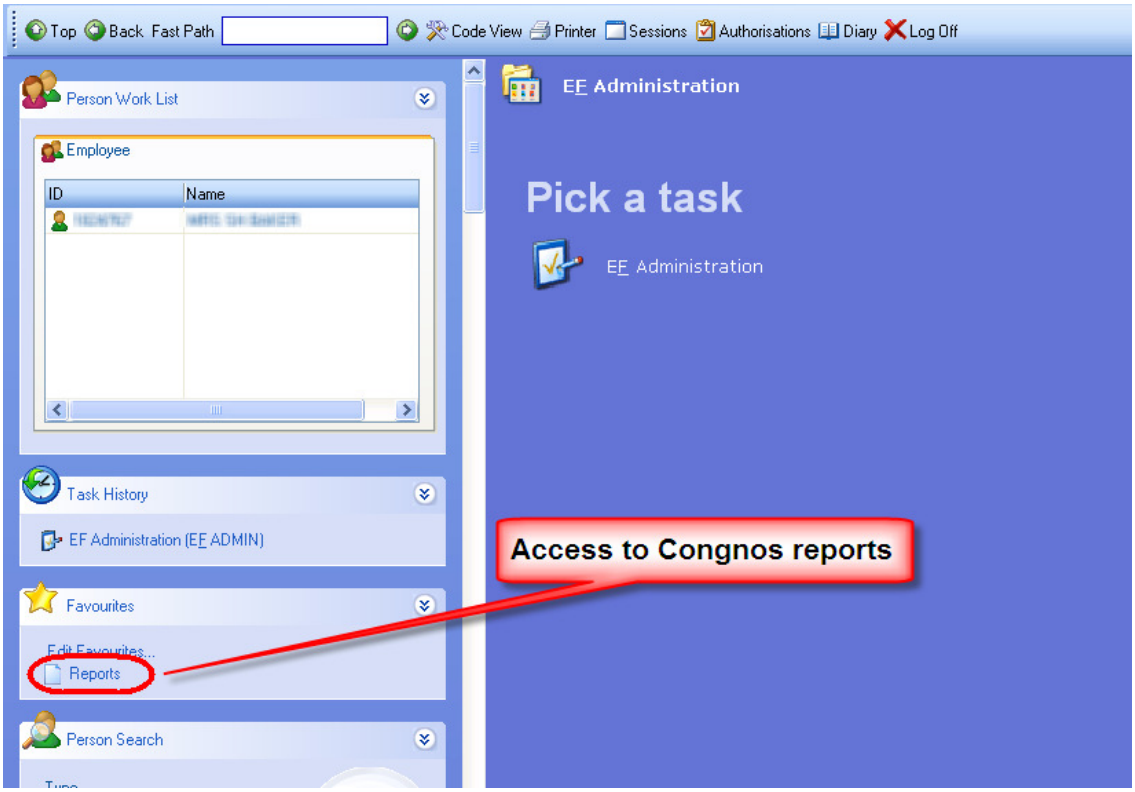
3.5 Click on Exit to return to the Absence Calendar screen.

3.6 When you have finished looking at the **Absence Calendar** screen, either click on the **Absence Details** tab to return to that screen or, if you have finished, click on the **Save** button to exit.



4 Using the Cognos Employee Work Pattern report to check an employee's start and end times

4.1 Click on the **Reports** link found in the **Favourites** area of the **Control Panel** on the left hand side of your ResourceLink **Home Page**.

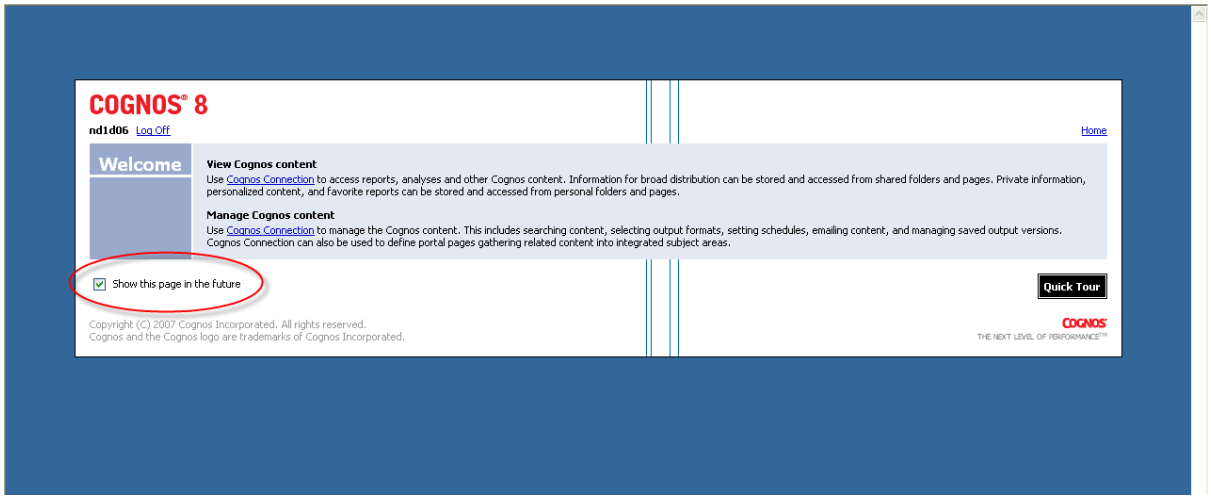


ⓘ Alternatively you can simply open a web browser (such as Internet Explorer) and click on your Cognos bookmark if you have created one.

The following warning box may appear:

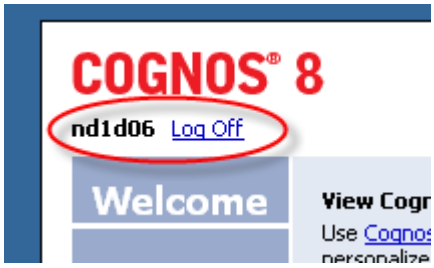
4.2 If it does, click on **Yes**.

The following Cognos screen will appear:

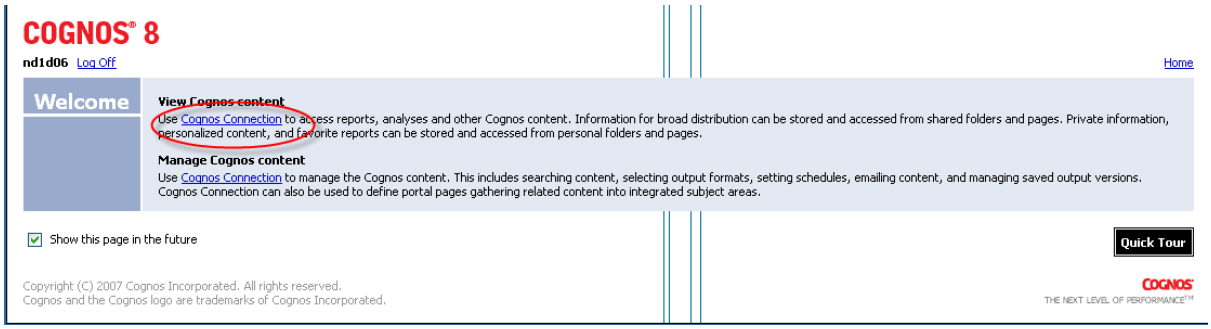


4.3 This screen appears each time you log on to the Cognos reports unless you un-tick the box labelled "**Show this page in future**, so it is worth un-ticking this box the first time you ever log in to Cognos.

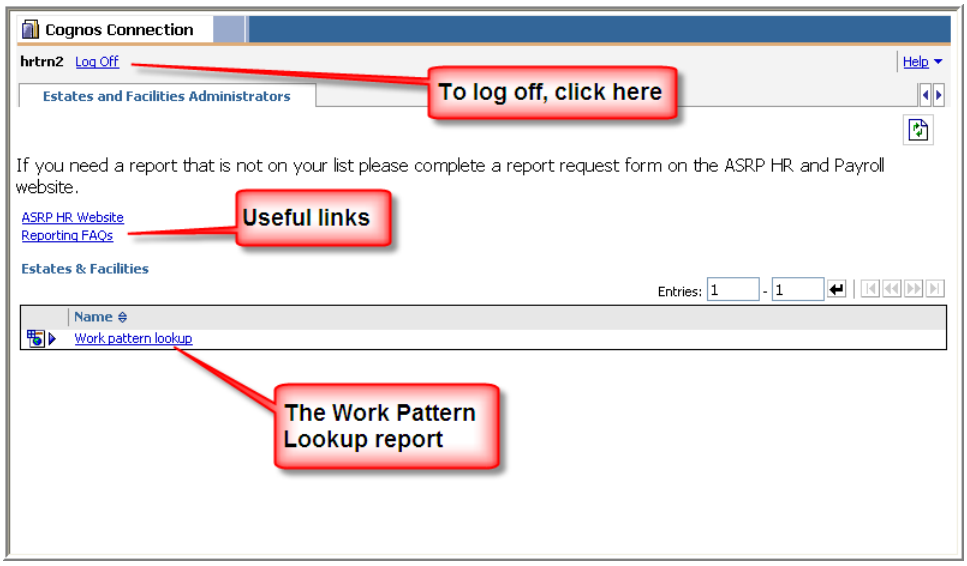
4.4 Your **Operator** log in will be shown at the top of the screen next to the link that enables you to **Log Off**



4.5 To enter and view the reports, click on the **Cognos Connection** link under **View Cognos Content**.

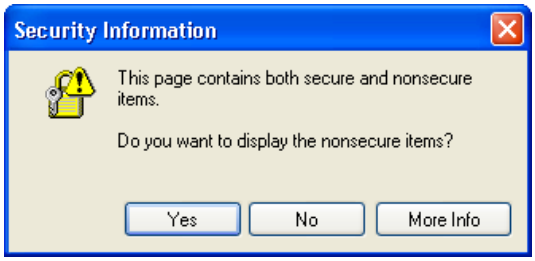


4.6 You will now see the Cognos reporting homepage:



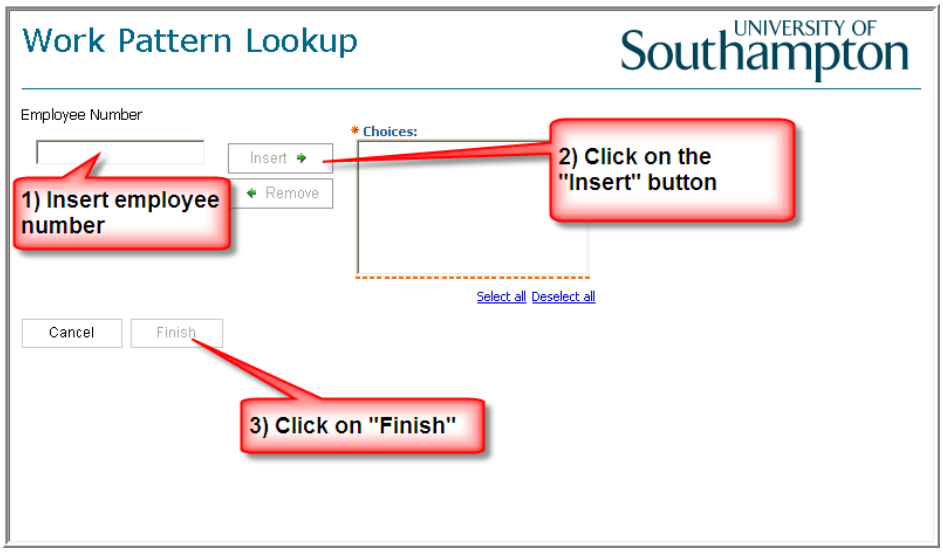
4.7 From the Cognos homepage, simply click on the title of the report you wish to run – in your case click on **"Work pattern lookup"** report:

- Depending on your web browser settings, the following warning box may appear:



4.8 If it does, click on **Yes**.

4.9 You will now see the following screen:



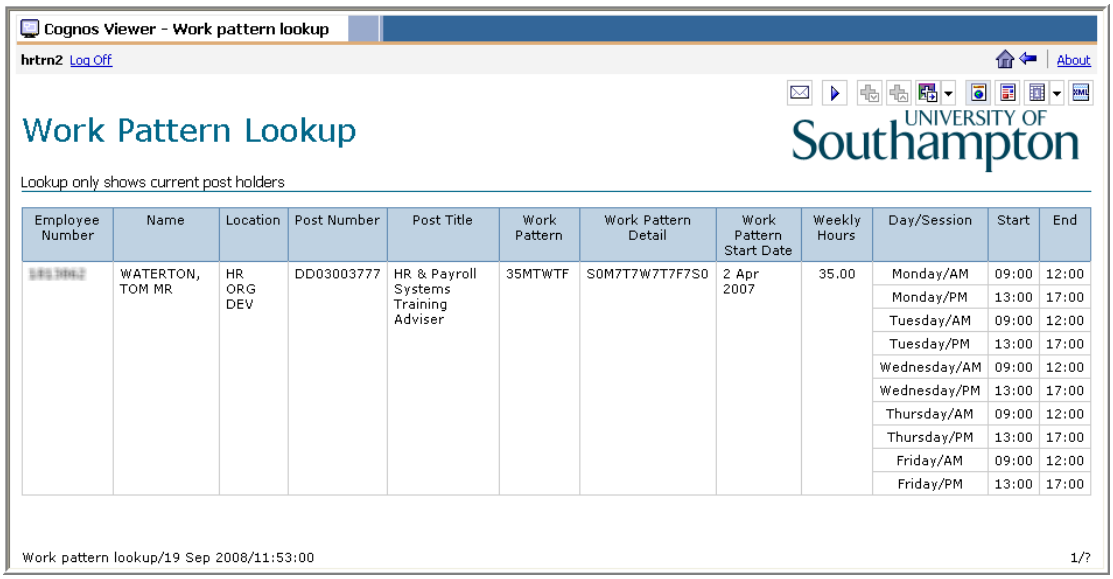
4.10 Insert the employee's number in the **Employee Number** field.

4.11 Click on the **Insert** button to move the employee's number across to the **Choices** field.

ⓘ Note, you can lookup more than one employee at a time by repeating steps 7.4 and 7.5 so that there are multiple numbers in the **Choices** field.

4.12 Click on the **Finish** button.

4.13 After a few seconds the Work pattern lookup report should open, showing the work pattern of the employee you have selected:


Cognos Viewer - Work pattern lookup

hrtrn2 Log Off About

Work Pattern Lookup

UNIVERSITY OF Southampton

Lookup only shows current post holders

Employee Number	Name	Location	Post Number	Post Title	Work Pattern	Work Pattern Detail	Work Pattern Start Date	Weekly Hours	Day/Session	Start	End
[redacted]	WATERTON, TOM MR	HR ORG DEV	DD03003777	HR & Payroll Systems Training Adviser	35MTWTF	S0M7T7W7T7F7S0	2 Apr 2007	35.00	Monday/AM	09:00	12:00
									Monday/PM	13:00	17:00
									Tuesday/AM	09:00	12:00
									Tuesday/PM	13:00	17:00
									Wednesday/AM	09:00	12:00
									Wednesday/PM	13:00	17:00
									Thursday/AM	09:00	12:00
									Thursday/PM	13:00	17:00
									Friday/AM	09:00	12:00
									Friday/PM	13:00	17:00

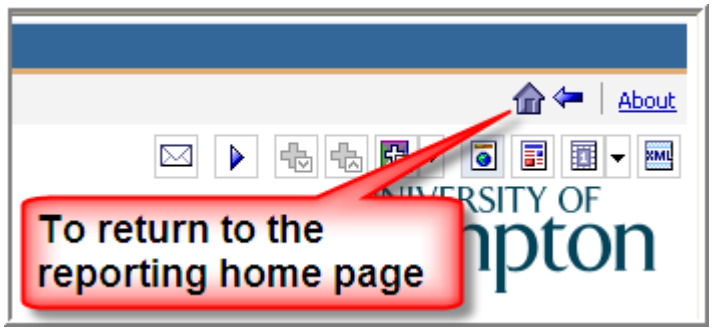
Work pattern lookup/19 Sep 2008/11:53:00 1/?

This Work Pattern Lookup report will show the following information:

The employee's number and name The post location (that is, which School / Department and division they work in) Their post number and title The short and long description of the work pattern they have on their HR record The details of this work pattern (showing day and start and end times)

4.14 This information may be useful to you when you record periods of annual leave and / or sickness absence for an employee.

4.15 Once you have viewed the information about this employee's work pattern, you can return to the Cognos home page by clicking on the **home** icon located at the top-right of the page:


About
To return to the reporting home page