Leave Time Spreadsheet

This spreadsheet keeps track of leave time. We will continue updating the leave time accrued and used fields in Peachtree when we run payroll. I will continue working with Peachtree(PT) to see what's going wrong on some records. This will be in addition to that. Once the problem in PT is cleared, we'll decide if we want to continue this application or not.

This is an open office spreadsheet. We will have 1 page in the spread sheet for each employee who is eligible for paid leave. Other than having multiple pages, it is a very simple spreadsheet application.

To learn more about spreadsheets, complete the on-line tutorial at GCF. From our library home page, click the Library icon and then click On-Line Computer Classes. Follow GCF's menus to Computer Training, Open Office, Open Office Calc.

Bringing up the spreadsheet for the leave records
On a staff workstation go to the common directory

- Click on the icon for your files (vickir's files on mine)
- Click on the folder (directory) named common
- Click on the folder named leave
- Click on the file named leavetime.ods
- The most recent version of these instructions should be in the file named leaveinstructions.odt

Totals are calculated by the formulas incorporated into the spreadsheet design. If a total appears to be incorrect, do not ever attempt to correct it by changing the total. Instead, locate and correct the data entry error(s) in the column above the total. If a formula gets messed up, IT will repair it for you.

Looking at or printing a staff member's leave time from the spreadsheet.

- Bring up the leave records
- Use the tabs at the bottom edge of the spreadsheet to select the employee
- To print the page you have showing on your default printer, click the printer icon near the top of the spreadsheet window. If you want to select a different printer, print multiple pages, etc, use File, Print.

Updating leave records.

- Follow the PT payroll instructions for updating the leave records in PT. This must be done while you are running the payroll. The steps which are not done in PT can be done the day after.
- For those employees who have used or accrued paid leave, update the spreadsheet
- Always begin by making sure you are on the correct employee sheet.
- After you enter the amount of leave, use the tab key to leave the space. Some versions of open office calc want to add extra characters if you don't tab out – especially if you have entered a negative number.

<u>If the employee used paid annual leave:</u>

- click in the annual leave column of the row for the pay date
- enter the amount used as a negative decimal number (-6.5)
- tab out of the space

- save the record

<u>If the employee used paid sick leave:</u>

- click in the sick leave column of the row for the pay date
- enter the amount used as a negative decimal number (-6.5)
- tab out of the space
- save the record

<u>If the employee accrued paid annual leave</u>, enter the hours of leave accrued

- click in the annual leave column of the row for the pay date
- note: if the employee also used paid annual in the same time period, you will need to insert a second row for the pay date (see below at 'Insert Row')
- enter the amount accrued as a positive decimal number (67.5)
- tab out of the space
- make a note to show you are adding accrued leave
- save the record
- print this page and file it with documentation for the pay period

<u>If the employee accrued paid sick leave</u>, use this formula to calculate hours of leave to be banked (if any) and hours of leave to be posted.

1. ________ Sick leave accrued
2. ________ Sick leave remaining from prior year (amount which may be banked)
3. ________ Sick leave to be posted in the sick leave column

- click in the sick leave column of the row for the pay date
- note: if the employee also used paid sick leave in the same time period, you will need to insert a second row for the pay date (see below at 'Insert Row')
- enter the amount from line #3 above as a positive number in the sick leave column (67.5)
- tab out of the space
- line 2 above shows the number of hours that are eligible for banking. If the employee has not reached his/her limit on banked sick leave, add as many of the hours from line 3 as possible (without going over the limit) in the banked sick leave column. See the area on banked sick leave below.
- use the notes area to document the entry
- save the record
- print the page and file it with documentation for the pay period.

Insert Row – Whenever an employee has hours to add (accrued leave) and hours to subtract (leave used) from the same column in the same pay period, insert an additional row in that employee's leave sheet so that the entry will be clear.

- Click on the date column on the row below where you want to insert a row.
- Click Insert and select Rows. A new row will appear on the employee's sheet.
- Highlight all the way across (from the date column to the initial column) a blank row on the employee's sheet.
- Right click in the highlighted row and select Copy

- Right click in the date column of the new row you inserted and select Paste. You should see zeros in the columns B through F.
- You can use the same date for both rows.

Adding a new sheet – Whenever an employee becomes eligible for leave, holidays, etc, add a sheet for the employee.:

- Open the sheet for the employee whose name is alphabetically just before the new employee's.
- Select: Insert
- Select: Sheet
- In the 'Insert Sheet' window, make sure the dot is in 'Before current sheet' and change the Sheet Name to the employee's user name
- Move to the last sheet in the spreadsheet (named z_template)
- Select Edit and then Select All. The entire sheet will be highlighted
- Select Edit and then Copy
- Move back to the new sheet you created
- Click in the first row and first column (A1)
  Select Edit and then Paste. You should have a new sheet in place for the employee.

Followup After Every Pay Period - After the spreadsheet is updated, post a pdf copy for the staff.

- Go to Common >leave (the directory where you work on the leave spreadsheet)
- There should be a file in that directory named leavetime.pdf – it is the pdf from the last pay period
    - Rename it to show the year, month and day like this; 090323.pdf for payroll date 03/23/2009

  Move it to the directory named older – it should slide in
- Go to the first page of the spreadsheet you updated – this is the page that has the message about how to search
- Select File > Export as PDF > Export >Save
- It will make a new file named leavetime.pdf in the common/leave directory
- Open the new file to be sure it shows your changes – it will, this is just a double check
- Close the file
- Right click on leavetime.pdf & select "copy"
- Go back 1 directory (to common)
- Right click on the directory background (not on a file or subdirectory) & select paste
  It will tell you that there is already a file & ask if it should replace it.
- Click replace

Send an email to staff with the following message:

The leave records are updated to show leave used or added at this pay period. Here is how to get to your records:

- *On your desktop, click the icon for your Home. For example, if my username was spudster I would click the icon for "spudster's Home"*
- *Click the folder named common*
- *Click on the file named leavetime.pdf. The file is a pdf. When it opens you will see this message: To locate your record, type your last name in the search field.*

- *Depending on which pdf version you are using, you may see a search field over or beside the document. If you do not see a search field, click "Edit" at the top of the window and then select "Find" or "Search", whichever is offered.*

If you have any problems with this, please email help@beau.org so we can assist you.

End of Year Procedure :

Part 1 – Close out the prior year spreadsheet and begin the spreadsheet for the new year

1. Rename the prior year's spreadsheet to leavetimeYYYY.ods (for example, at the end of 2009, the file named leavetime.ods will be renamed to leavetime2009.ods).
2. Export leavetimeYYYY.ods as a pdf and make it available in the /common directory
3. Rename a copy of blankleave.ods to leavetime.ods. This will be the spreadsheet you will use in the new year.
4. Adjust the new leavetime.ods file to show leave balances carried forward, notes, etc.
5. Be sure leavetime.ods has a sheet for each employee. Add sheets as needed.
6. Take out sheets in leavetime.ods for employees who are no longer at the library.

Part 2 – Each employee reviews and signs his/her leave sheet

1. Print a copy of the spreadsheet.
2. Print a copy of the last sheet of these instructions (Employee Leave Review Form) for each employee.
3. Staple each employee's leave sheet to a copy of the Employee Leave Review Form
4. Distribute the sheets via the employee mail slots
5. E-Mail staff asking them to review the leave form, complete the Employee Leave Review and return it in the Payroll slot or by fax. Be sure to give a date by which the review sheets are to be returned.
6. As the sheets are returned, work with employees and supervisors to resolve any problems.
7. Followup with employees and supervisors regarding any forms which are not returned on time.

Part 3 – After reviewing and correcting problems, update and complete the final leave spreadsheet for the year

1. Update the spreadsheet you renamed to leavetimeYYYY.ods (example leavetime2009.ods) to correct any problems that showed up in the employee reviews.
2. Print a copy of the spreadsheet for the audit reports
3. Print a copy of the spreadsheet and file each employee's sheet in the employee's personnel folder.
4. Export the spreadsheet to a pdf. Store a copy in the directory you use when you work on leave and store a copy in the /common directory so that it will be available to employees.

Part 4 – Double check the spreadsheet for the new year.

1. Check the balances and notes carried forward to the new year's spreadsheet with the final copy of the prior year's spreadsheet.P
2. Update the new year's spreadsheet where necessary.