

Editing Existing Leave Taken

APTAWEB-11612

Introduction

Users needed an easier way to edit posted Leave Requests that had been entered in error rather than just doing Adjustments. This issue is resolved in this change.

Edit Command

This functionality applies to **Taken** transaction types **only**.

The system does not allow editing of transactions already imported into payroll. Any other types of transactions: Adjustment or Accrual, the Edit button if chosen will show the read only detail of the transaction as it did before.



Figure 1: Command Buttons on Leave Detail Screen

A View (read only) command was added to the Leave Detail screen so users can view the transaction detail without performing the Edit command. The Edit command is also available for Request records in Leave Balance and on the Leave Tab in Manage Employees.

The following fields are editable.

- Amount – Creates a single new transaction with an adjusting amount. The original leave taken amount plus the adjusting amount will equal the new leave taken amount. When using this option, key in what the original value should have been.
- Date – Creates two new leave taken transactions, one to cancel the original and another to reinstate it on the new date.
- Comment – Allows for additional text to be appended to the existing comment. The original comment text is retained. This will update the original transaction, but the comment only.

The **Save** command will post the Edits.

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The example below shows an original taken amount of -8 hours. The employee only used 4 hours instead of 8. Transaction Amount -4 is keyed into the Edit Amount and once saved, the amount taken changed from -8 to -4. Minus 4 was added to the Transaction Amount field and an Additional Comment was added.

The screenshot shows a window titled "Edit Leave Transaction" with a close button (X) in the top right corner. Below the title bar, the main heading reads "Vacation - Classified Taken for Baker, Charles J on 7/7/2021". Underneath, it lists "Transaction Id: 23766", "Status: Posted", and "Accounting Cycle: FY2021-2022". A "Details" section is expanded, showing the following information: Transaction Type: Taken; Employee: Baker, Charles J; Leave Type: Vacation - Classified; Units: Hours; Available Amount: 30.0000; Transaction Amount: -4.0000 (with a red asterisk indicating a change); Transaction Date: 07/07/2021; Transaction Comment: ut labo; and Additional Comment: Charles took only 4 hours. At the bottom of the window are "Save" and "Cancel" buttons.

Figure 2: Edit Command on Leave Taken Record

The Save button was selected and the following Confirmation box appeared on the screen.

The screenshot shows a "Confirmation" dialog box with a close button (X) in the top right corner. The text inside reads: "The amount has been changed on this posted Leave Transaction. A new transaction will be created with an adjusting amount. The original amount of -8.00 combined with the adjusting amount of 4.00 will produce the newly entered amount of -4.00." It continues: "Additional Comment text has been provided for this posted Leave Transaction. This text will be appended to the transaction's original Transaction Comment." Below this, it asks "Do you wish to continue?" and provides "Yes" and "No" buttons.

Figure 3: Confirmation Box for Edit Changes

The Adjusting Transaction below was system created.

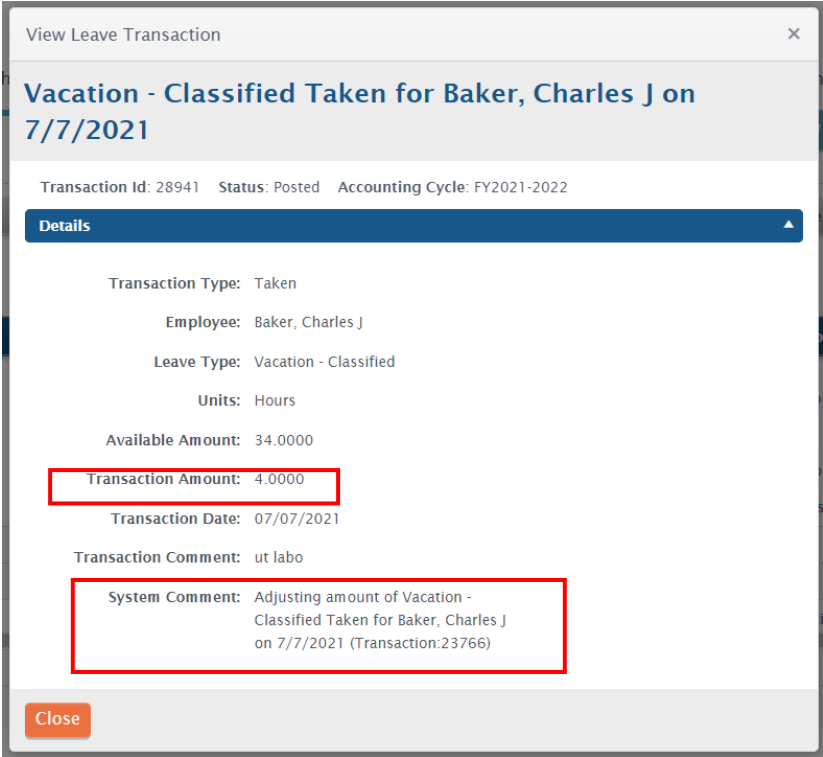


Figure 4: System Created Edit Adjustment

Below is the screen view of a completed Edit. The -8 of the original request with the added 4 from the edit equals the new combined total of -4. The Additional Comment was added to the original record.

	Leave Type	Transaction	Trans...	Start Date	Units	Actual Amo...	Status	Comment
Employee Name: Baker, Charles J								
<input type="checkbox"/>	Vacation - Classified	23766	Taken	07/07/2021	Hours	-8.0000	Posted	ut labo; Charles took only 4 hours
<input type="checkbox"/>	Vacation - Classified	28941	Taken	07/07/2021	Hours	4.0000	Posted	ut labo

Figure 5: Edit Transaction Added to Screen

The next example shows a date change only. The original Request was for 10/22/2021 but the actual date of the request was 10/21/2021.

<input type="checkbox"/>	Leave Type	Transaction	Trans...	Start Date	Units	Actual Amo...	Status	Comment
Employee Name: Clayburn, Annie V								
<input type="checkbox"/>	Vacation - Classified	28836	Taken	10/22/2021	Hours	-8.0000	Posted	or incid

Figure 6: Edit of Transaction Date

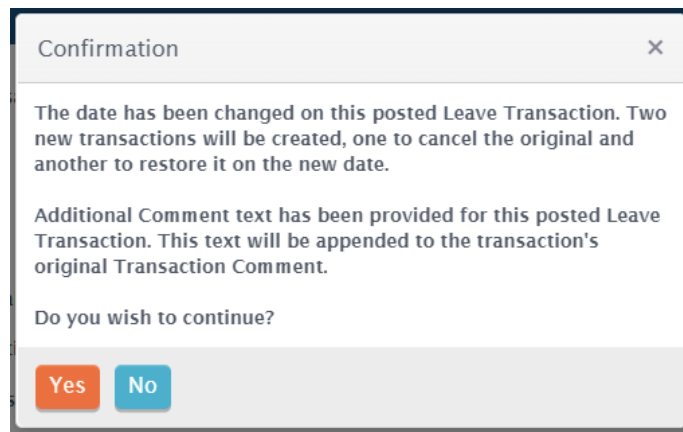


Figure 7: Confirmation Box after Edit Command

Result of Edit command – Two new system created transactions. Transaction 28942 cancels the original transaction. Transaction 28943 adds the correct new transaction and adds a comment.

<input type="checkbox"/>	Employee Name	Transactio...	Transaction...	Start Date	Units	Actual A...	Status	Comment
Leave Type: Vacation - Classified								
<input type="checkbox"/>	Clayburn, Annie V	28836	Taken	10/22/2021	Hours	-8.0000	Posted	or incid; Wrong date on Request Transaction
<input type="checkbox"/>	Clayburn, Annie V	28942	Taken	10/22/2021	Hours	8.0000	Posted	or incid
<input type="checkbox"/>	Clayburn, Annie V	28943	Taken	10/21/2021	Hours	-8.0000	Posted	or incid
						Sum:		
						-8.0000		

Figure 8: Result Showing on Leave Detail Screen

The new Edit command should save users a lot of time when changes must be made to the Amount, Date or Comment of the original Transaction.