User Guide New Leave Supervisor Mode



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LEAVE APPLICATION

To apply leave, employee must first be assigned with a leave group within an effective date range.

1. Apply Leave

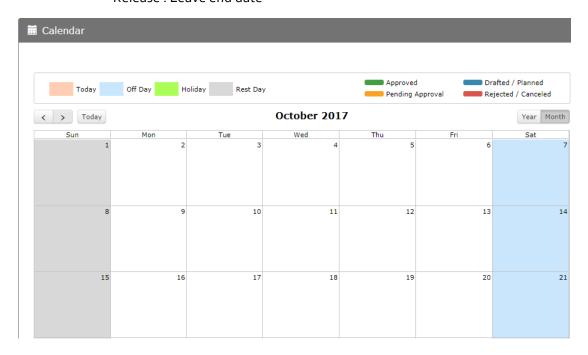
There are two ways to apply leave from the system:

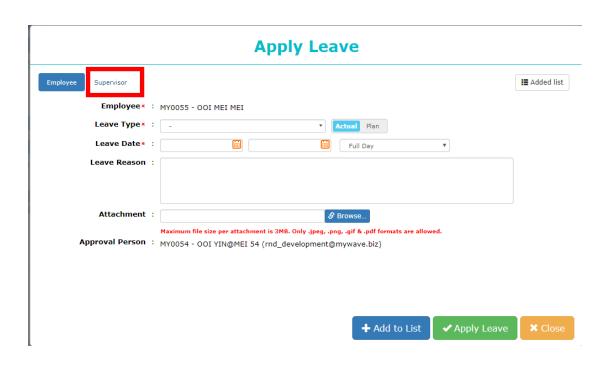
i. Click from the icon highlighted below

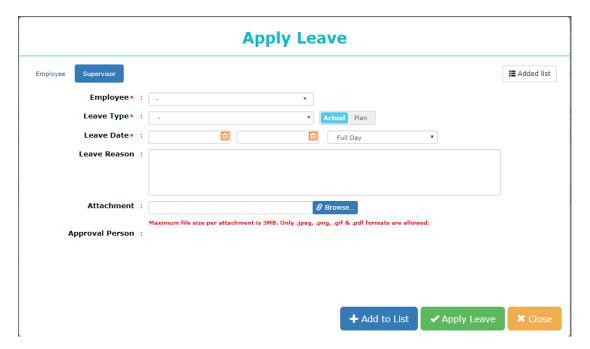


ii. Simply click-hold at any of the cell at the calendar view then release

Click-hold : Leave start dateRelease : Leave end date







Once the popup box appears as shown as above, click the "Supervisor" button beside "Employee" and you may start to apply leave.

Follow the steps below to apply a leave:

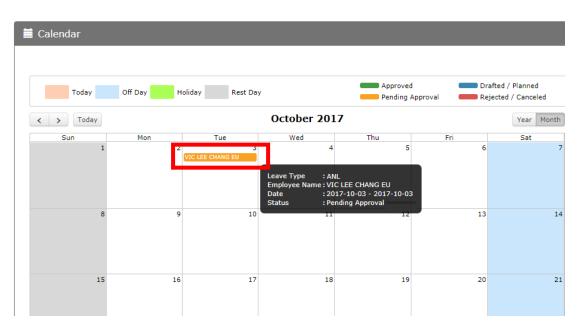
- 1. Select an employee
- 2. Select a leave type
- 3. Select a pair of leave date range
- 4. Select the leave method

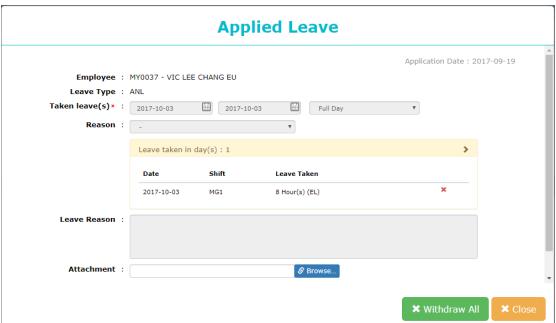
- 5. Specify your reason (*It may be mandatory depends on the settings*)
- 6. Attach your attachment (It may be mandatory depends on the settings and maximum of 3MB per image file)
- 7. Click Apply Leave to submit the application

2. Withdraw a leave

Only leave which is still under pending approval can be withdrawn.

To withdraw a leave from the system, click at the amber colored-bar as shown in below.





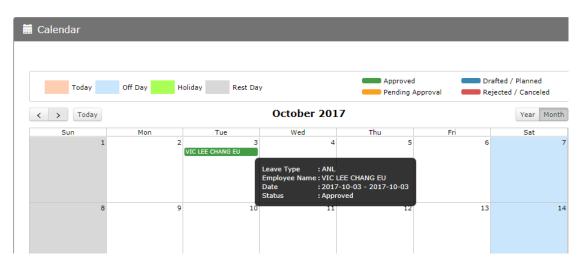
Follow the steps below to withdraw a leave application:

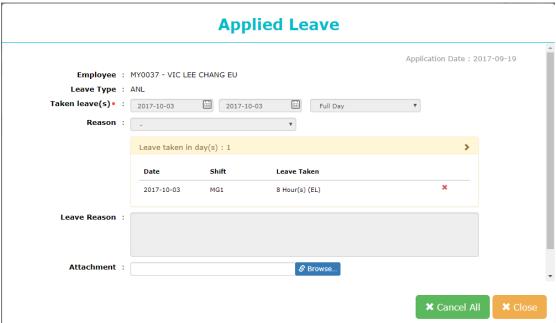
- 1. Click at the ** Withdraw All to withdraw the whole leave
- 2. Click at the * icon to withdraw only the particular date

3. Cancel a leave

Only approved leave can be canceled.

To withdraw a leave from the system, click at the green colored-bar as shown in below.





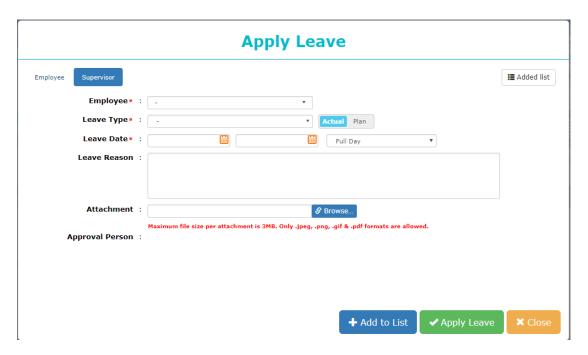
Follow the steps below to cancel a leave application:

- 1. Click at the Cancel All to cancel the whole leave
- 2. Click at the * icon to cancel only the particular date

4. Add draft leave

Draft leave is a leave was drafted by employee/supervisor and to be submitted later on.

Drafted leave will not submit for approval and can only be seen by employee himself/herself, supervisor and also authorized admin(s).



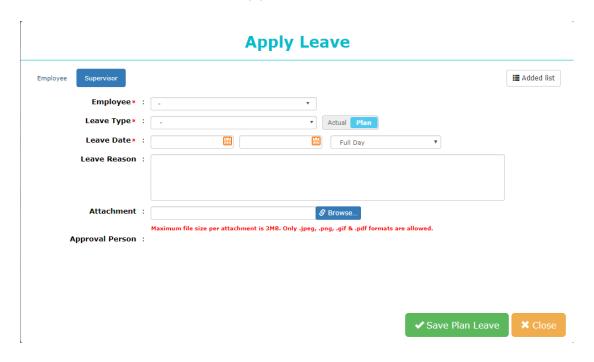
Follow the steps below to add a drafted leave:

- 1. Select an employee
- 2. Select a leave type
- 3. Select a pair of leave date range
- 4. Select the leave method
- 5. Specify your reason (*It may be mandatory depends on the settings*)
- 6. Attach your attachment (It may be mandatory depends on the settings and maximum of 3MB per image file)
- 7. Click + Add to List to add a drafted leave

5. Add a plan leave

Planned leave is similar to drafted leave. The only difference is that the planned leave is to publish the leave and to inform employee's colleagues that the employee has planned to take the leave on certain days.

** ONLY AUTHORISED EMPLOYEE(S) IS/ARE ABLE TO VIEW THE PLAN LEAVE



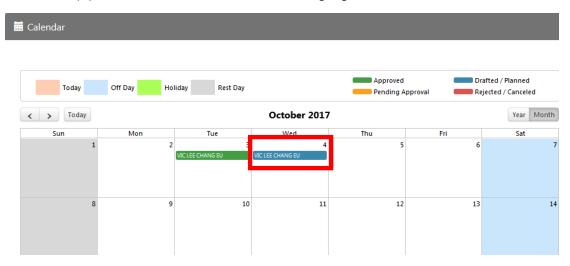
Follow the steps below to add a drafted leave:

- 1. Select an employee
- 2. Select a leave type
- 3. Select a pair of leave date range
- 4. Toggle Actual -> Plan
- 5. Select the leave method
- 6. Specify your reason (*It may be mandatory depends on the settings*)
- 7. Attach your attachment (It may be mandatory depends on the settings and maximum of 3MB per image file)
- 8. Click Save Plan Leave to add a drafted leave

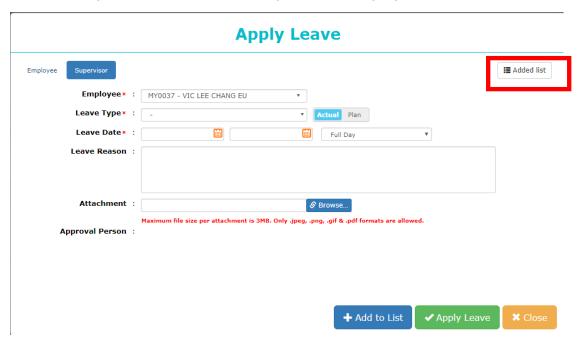
6. Convert drafted/planned leave

There are two ways to view drafted/planned leave from the system:

i. Simply click at the blue colored-bar which highlighted below

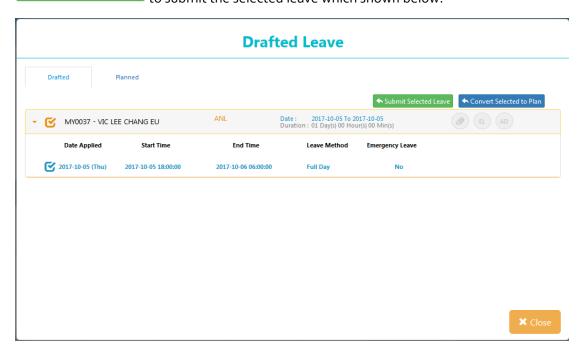


ii. Top-right hand corner when applying leave which highlighted below

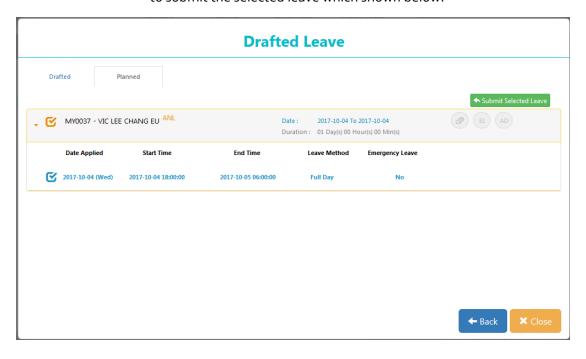


A. Drafted/planned leave to actual leave

For convert drafted leave to actual leave, simply tick the leave you want and click at the Submit Selected Leave to submit the selected leave which shown below.

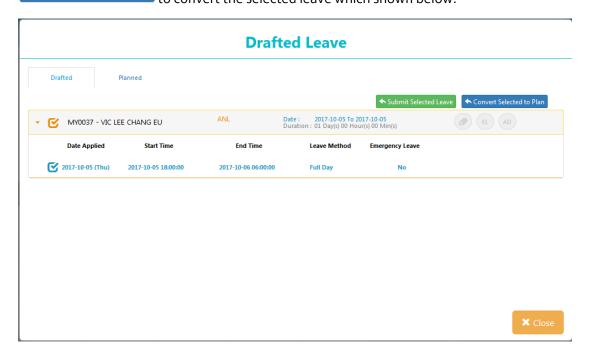


For convert planned leave to actual leave, simply tick the leave you want and click at the Submit Selected Leave to submit the selected leave which shown below.



B. Drafted leave to planned leave

For convert drafted leave to planned leave, simply tick the leave you want and click at the Convert Selected to Plan to convert the selected leave which shown below.



7. Edit drafted/planned leave

To access to drafted/planned leave please refer to <u>"6. Convert drafted/planned leave"</u>

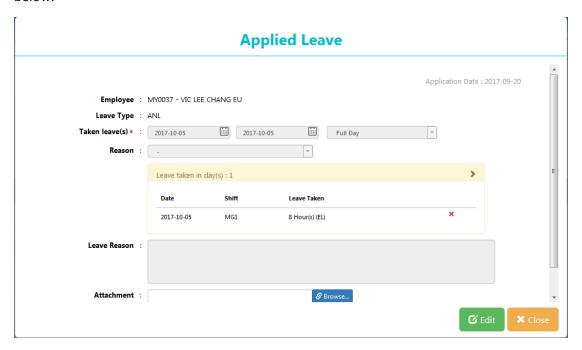
Simply move your mouse's cursor at the header level and a greyed out pencil-like icon will then appears as shown below.



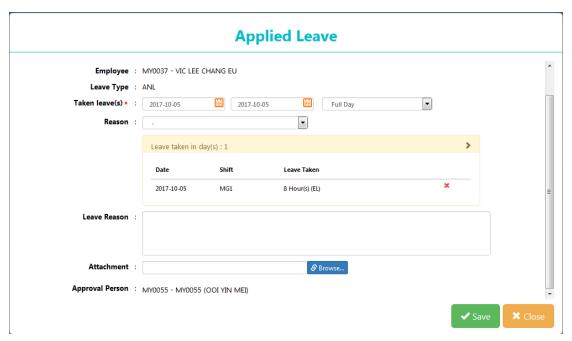
Click at the pencil-like icon to edit the drafted/planned leave



Then you will be brought to a new screen. Click to edit the leave details as shown below.



After everything has been amended, click save the details.



8. Remove drafted/planned leave

To access to drafted/planned leave please refer to <u>"6. Convert drafted/planned leave"</u>

Simply move your mouse's cursor at the header level and a greyed out cross-like icon will then appears as shown below.



Click at the cross-like icon to remove the drafted/planned leave



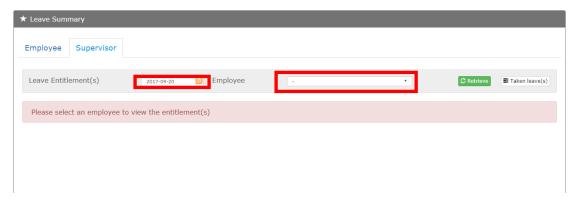
LEAVE SUMMARY

1. View quick summary

To access to summary to view leave entitlement, click at the highlighted icon below



System will then retrieve employee's leave entitlement from the reference date and employee as highlighted below



2. View taken leave(s)

To access to taken leave, please refer to <u>"9. View quick summary"</u>

Click Taken leave(s) as shown below.



System will then retrieve employee's leave taken as shown below



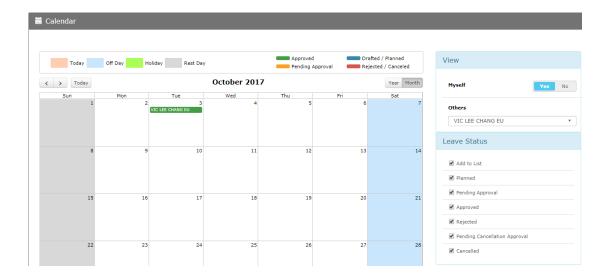
Employee/Supervisor can still perform leave cancellation/withdrawal from this screen

CALENDAR

1. Calendar View

In calendar view, employees can choose to view other employees' planned/approved leave(s) (Depends on company settings).





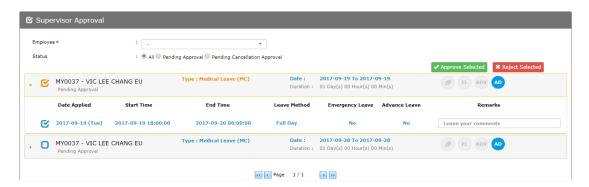
- Employee can choose to exclude himself/herself from appearing in the calendar view in **Myself** section
- Employee can choose to include other employees to appear in the calendar view in the **Others** section
- Employee can choose to filter the leave status at the **Leave Status** section

LEAVE APPROVAL (SUPERVISOR)

Supervisor can choose to approve the leave application / leave cancellation from via system/email/mobile

1. Approve/Reject Leave (via System)



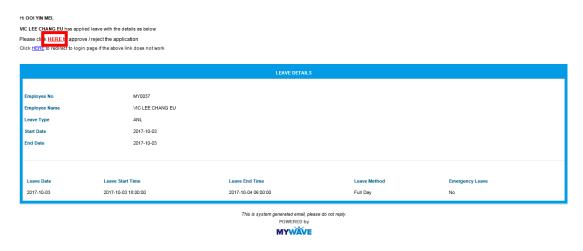


Supervisor can choose to filter the employees before approve/reject the leave application/cancellation

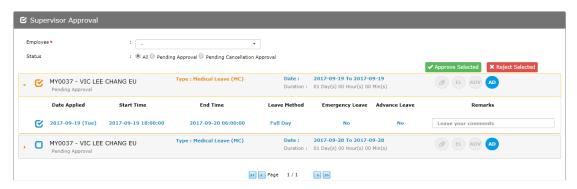
Follow the steps below to approve/reject leave:

- 1. Click at the **"Supervisor Approval**" icon highlighted above
- 2. Click at the leave headers to view more details
- 3. To key in remarks type in the Leave your comments which provided in each of the details
- 4. Tick at the checkboxes
- 5. To approve click ✓ Approve Selected , to reject click ★ Reject Selected

2. Approve/Reject Leave (via Email)



Click the highlighted link if it is applicable to you.



Supervisor can choose to filter the employees before approve/reject the leave application/cancellation

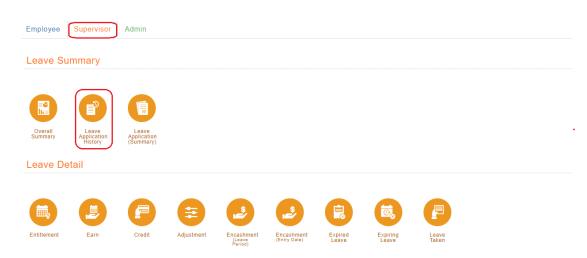
Follow the steps below to approve/reject leave:

- 1. Click at the leave headers to view more details
- 2. To key in remarks type in the Leave your comments which provided in each of the details
- 3. Tick at the checkboxes
- 4. To approve click Approve Selected , to reject click Reject Selected

LEAVE REPORT



- 1. To view more detail on subordinates' leave, click on the Report icon.
- 2. Click on Supervisor Tab. Below are the reports available. Click on the individual report to view.

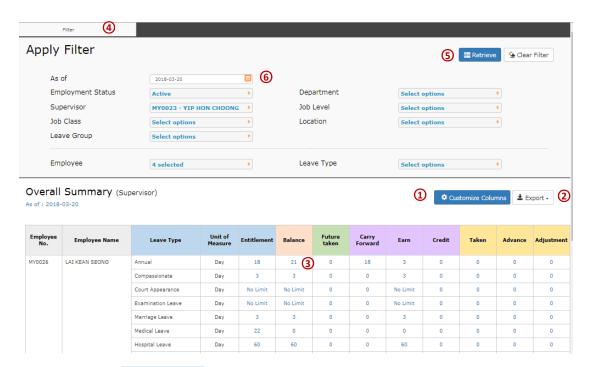


List of reports:

- a. Overall Summary
- b. Leave Application History
- c. Leave Application (Summary)
- d. Detail reports on :-
 - Entitlement
 - Earn
 - Credit
 - Adjustment
 - Encashment
 - Expired Leave
 - Expiring Leave
 - Leave Taken

a. Overall Summary

By default, the report shows leave summary as of current date.



- 1. Click on Customize Columns to show more column
- 2. Click on to download report to excel
- 3. Click on the value to show details record that contribute to the value

Leave Type	Unit of Measure	Entitlement	Balance	Future taken	Carry Forward	Earn	Credit	Taken	Advance	Adjustment
Annual	Day	18	21	0	18	3	0	0	0	0
Compassionate	Day	3	3	0	0	3	0	0	0	0
Court Appearance	Day	No Limit	No Limit	0	0	No Limit	0	0	0	0
Examination Leave	Day	No Limit	No Limit	0	0	No Limit	0	0	0	0
Marriage Leave	Day	3	3	0	0	3	0	0	0	0
Medical Leave	Day	22	0	0	0	0	0	0	0	0
Hospital Leave	Day	60	60	0	0	60	0	0	0	0

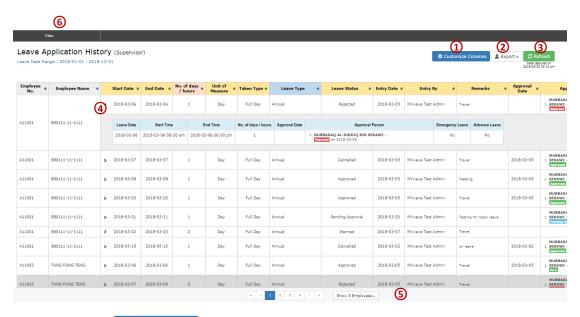
4. Click on Filter to apply filtering for the report



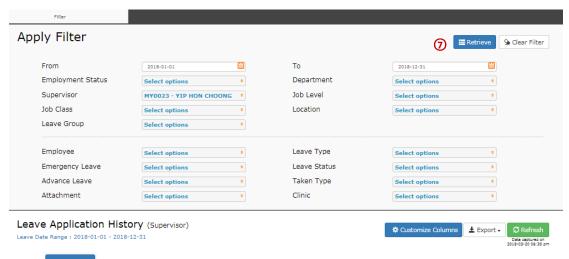
Click on to filter the data.

b. Leave Application History

By default, the report shows leave taken from 1st Jan until 31st Dec of the year.



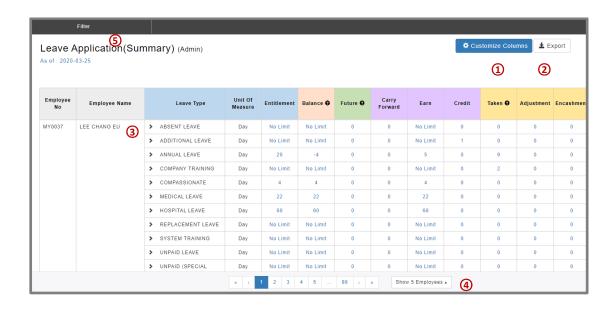
- 1. Click on Click on to show more column
- 2. Click on to download report to excel
- 3. Click on Cretrieve latest data.
- 4. Click on record to show individual date and detail of the application record.
- 5. Paging and no. of employee per page
- 6. Click on Filter to apply filtering for the report.



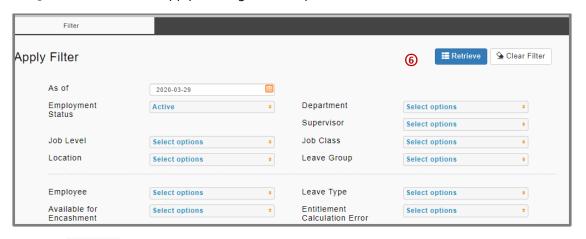
7. Click to filter the data.

c. Leave Application (Summary)

By default, the report shows leave as of current date.



- 1. Click on Customize Columns to show more column
- 2. Click on to download report to excel
- 3. Click on record to show individual date and detail of the application record.
- 4. Paging and no. of employee per page
- 5. Click on Filter to apply filtering for the report.



6. Click ^{■ Retrieve} to filter the data.

d. Leave Detail Report

Leave Detail











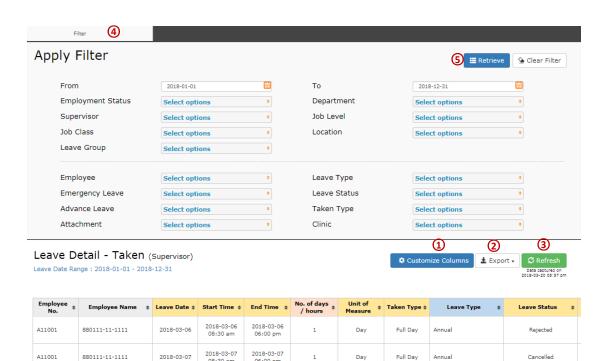






Detail reports inclusive of :-

- Entitlement
- Earn
- Credit
- Adjustment
- Encashment
- Expired Leave
- Expiring Leave
- Leave Taken



1. Click on

Customize Columns to show more column

2018-03-08 08:30 am 2018-03-08 06:00 pm

Full Day

Annual

- 2. Click on to download report to excel
- 3. Click on Sefresh to retrieve latest data.

2018-03-08

- 4. Click on Filter to apply filtering for the report.
- 5. Click Retrieve to filter the data.

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Approved