# USER GUIDE NEW LEAVE

Administrative



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# **ADMINISTRATIVE PAGE**

#### **SUMMARY**

Leave management provides these administrative processes:

- 1. Manage Leave Types
- 2. Manage Leave Combine Limit / Priority List
- 3. Manage Eligibility Group
- 4. Manage Credit Hour Leave Types
- 5. Manage Employees' Leave Group & Entitlements
- 6. Manage Employees' Leave Adjustment
  - a. Credit Leave
  - b. Leave Balance Adjustment
  - c. Leave Effective Date Adjustment
  - d. Leave Entitlements Adjustment
  - e. Encashment
- 7. View Entitlement Calculation Error
- 8. Additional Drop-Down Setup
- 9. Calendar View Control

#### **ACCESS TO ADMINISTRATIVE PAGE**

In the Leave Menu, navigate to Administrative Tab



















# **LEAVE POLICY**

#### **HOW TO CONFIGURE YOUR COMPANY LEAVE POLICY REQUIREMENTS?**

Leave types define the broad categories of absence your company want to track, such as illness, personal vacation, or maternity leave. Under this section, administrator can:

- a) Assign leave type to a leave group according to their leave entitlement.
- b) Copy the changes made on leave types to leave groups
- c) Customization on leave types at each employee level.

#### Add A New Leave Type

1. Go to Administrative > Leave Policy, click on "Leave Type"

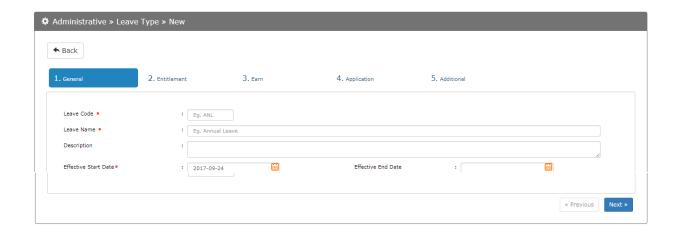


2. Click on "New" to add new leave type



3. Setup all the tabs by clicking on "Next" or the Tab itself. Click "Save" after complete.

[Note: refer to leave type control for more explanation]



#### **Edit Leave Type**

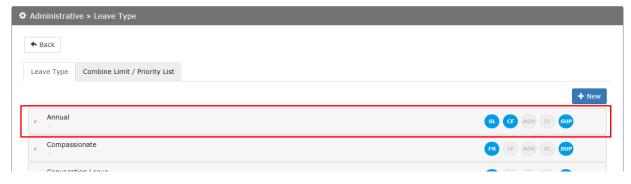
Period Cycle control cannot be changed if there are leave application / adjustment records (Eg: changing from calendar year to life time).

#### To edit leave type:

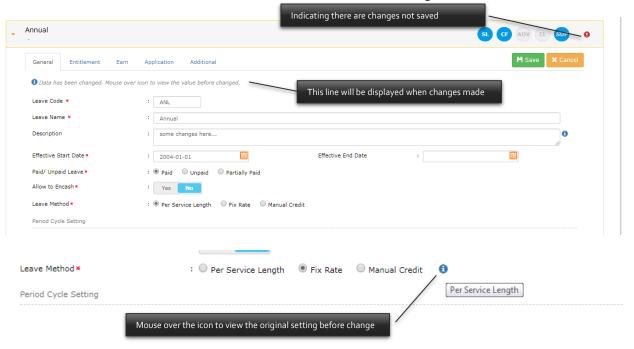
1. Go to Administrative > Leave Policy, click on "Leave Type"



2. Click on the leave type to edit.



3. "Save" and "Cancel" button will be shown when there are changes made.



#### **Delete Leave Type**

Leave Type cannot be deleted if there are applications / adjustment records by employee. If that is the case, all leave application / adjustment record must be cancelled first in order to proceed.

#### To delete leave type:

1. Go to Administrative > Leave Policy, click on "Leave Type"



2. Click on the leave type to delete.



3. Click on the "Delete" button.

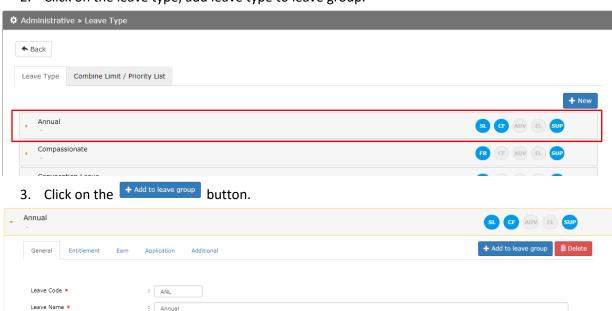


#### Add Leave Type to Leave Group

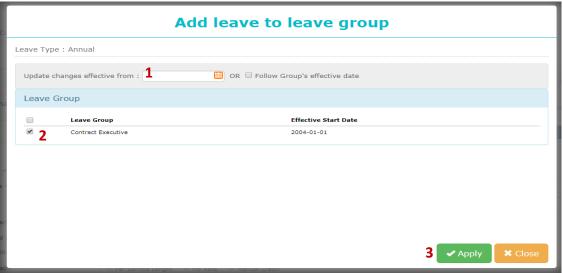
1. Go to Administrative > Leave Policy, click on "Leave Type"



2. Click on the leave type, add leave type to leave group.



4. Insert Effective date, select Leave Group to add the selected Leave Type. Screen displays only leave group that **does not have** any leave type. Click "Apply" button to add to leave group.

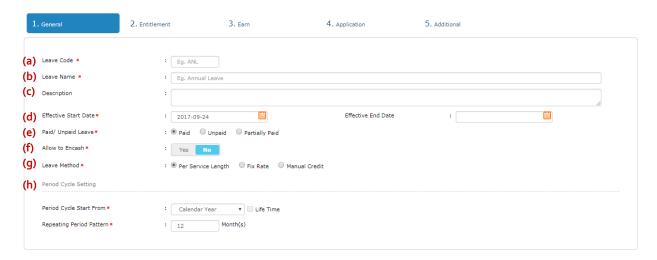


#### **LEAVE TYPE CONTROL**

There are 5 sections to setup leave type:

- 1. General
- 2. Entitlement
- 3. Earn
- 4. Application
- 5. Additional

#### 1. General

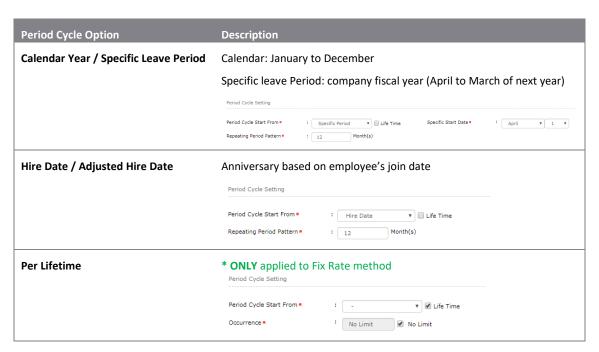


- a. Leave Code abbreviation for the leave type. Max 10. must be unique from other leave types.
- b. Leave Name naming the leave type. Max 50. must be unique from other leave types.
- c. **Description** description of the leave type. An optional field.
- d. **Effective Date** the effective date range for the leave type. User may put effective end date **blank** if the leave type will not expire.
- e. Paid / Unpaid Leave indicate paid or unpaid leave. E.g. Paid Annual Leave; Unpaid Leave.
- f. **Allow Encashment** indicate encashment of Annual Leave or not.
- g. **Leave Method** basis of the leave calculation.

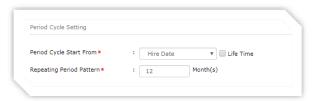
Leave Method Option	Description
Per Service Length	Entitlement depends number of year of service employee with employer. E.g.:
	<ul><li>0-5 years: 14 days;</li><li>5 years onwards: 16 days;</li></ul>
Fix Rate	Fix no. of hours / days entitlement

Manual Credit	Earn upon credit or conversion from OT claim	
	E.g.: Replacement leave	

- h. **Leave Period Cycle** leave cycle that following the commencement of employment and each anniversary thereafter.
  - i. Leave Period started based on:



- ii. Repeating Period Pattern: \*DOES NOT apply to per lifetime leave
  - E.g.: every 12 months (1 year)



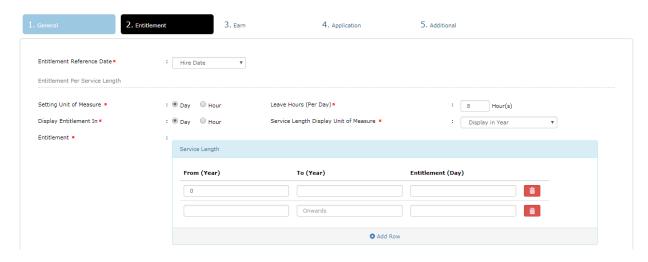
- iii. Occurrence: \* ONLY applied to per lifetime leave
  - (x) number of occurrence (e.g.: Maternity) / No Limit (e.g.: Compassionate Leave)



#### 2. Entitlement

Maximum of leave days based on length of service

Per Service Length



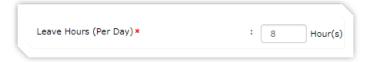
a. Entitlement Reference Date – reference date for entitlement prorated



b. Setting Unit of Measure – Determine entitlement is given either in Day or Hour



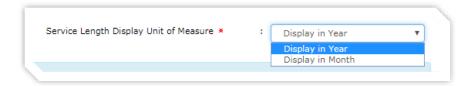
- c. Leave Hours (Per Day) Determine entitlement is given either in Day or Hour
  - i. Default is 8 hours per day.
  - ii. \* This setting is important for Hourly Leave
    - For 12 hours shift, this field must set to 12 hours as well



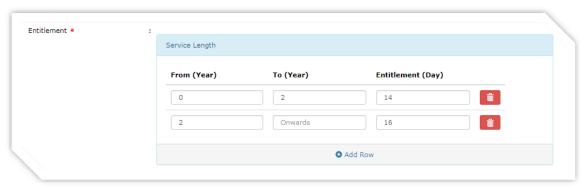
d. Display Entitlement In – Display leave type entitlement in day or hour



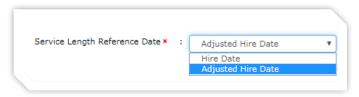
e. Service Length Display Unit of Measure – Year / Month for the service length setting



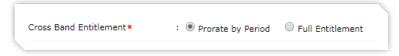
- f. Entitlement setting the entitlement base on length of service
  - i. Range (From & To) must be in descending order
  - ii. Entitlement must not be decreasing
  - iii. Last entitlement row "To" must remain empty
  - iv. Click on to remove individual range
  - v. Click Add Row to add additional range



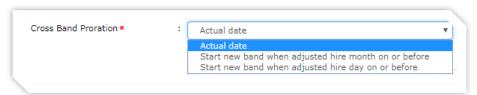
g. **Service Length Reference Date** – calculate length of service based on Hire Date / Adjusted Hire Date



- h. **Cross Band Entitlement** Entitlement proration method when occurs of a band changed within the leave cycle.
  - i. <u>Prorate by Period</u> yes, prorate the entitlement (based on Service Length Reference Date)
  - ii. <u>Full Entitlement</u> no proration when band is changed \* **APPLICABLE** only if "Service Length Display Unit of Measure" is in "Month"



- i. Cross Band Proration proration calculation method \* Applicable only if selected option of "Prorate by leave period" (selection under Cross Band Entitlement)
  - i. Actual Date Prorate based on exact date



ii. Start new band when Hire / Adjusted Hire month on or before certain month



iii. Start new band when Hire / Adjusted Hire day on or before certain day



#### j. Rounding Method

i. Entitlement Rounding – rounding method for entitlement



- No Rounding (Default)
- Round up to nearest 1 / 0.5 / 0.1
- Round up to nearest 1 / 0.5 / 0.1
- Round down to nearest 1 / 0.5 / 0.1
- Round to 1 when more than or equal to certain value, round down to 0 when less that the value



- ii. Apply Rounding To
  - All Year Entitlement or,
  - First Year Entitlement Only

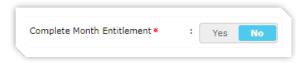


#### k. Entitlement Proration Setting

i. Full Period Entitlement – To prorate or not. Set "Yes" if leave not prorated



- Eg: Medical Leave, entitlement is fully grated without prorated for new hire / resigned staff
- ii. <u>Complete Month Entitlement</u> If resign employee does not serve complete month, the resignation month is **not included** in the entitlement calculation.



#### Example:

- Employee joined on 2016-01-08, resigned on 2017-12-06, no. of servicing month is 10 months.
- Employee joined on 2016-01-08, resigned on 2017-12-07, no. of servicing month is 11 months.
- 2016-01-08 to 2016-02-07 is considered as 1 completed month.
- iii. <u>First Month Entitlement</u> entitlement proration calculation for new hired employee

  \*NOT Applicable if Full Period Entitlement or Complete Month Entitlement is ON



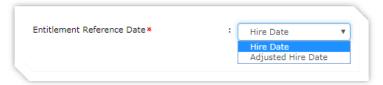
iv. <u>Last Month Entitlement</u> – entitlement proration calculation for resigned employee
 \* NOT Applicable if Full Period Entitlement or Complete Month Entitlement is ON

Γ	Last Month Entitlement*	: O Prorate daily					
		Full entitlement if resign on or before	15	▼	half if resign before	*	
					half if resign before not entitle if resign before		

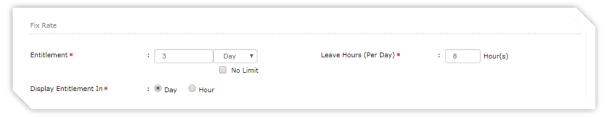
#### Fix Rate Setting

#### Non-Lifetime Leave

a. **Entitlement Reference Date** – reference date for entitlement proration



b. Fix Rate Setting – no. of entitlement days / hours



- 1. Entitlement no. of days of entitlement for the leave period cycle
- 2. <u>Leave Hours (Per Day)</u> Entitlement is given in how many hours per day
  - i. Default is 8 hours per day.
  - ii. This setting is important for Hourly Leave.
- 3. <u>Display Entitlement In</u> Show leave type entitlement in Day / Hour in all the screen

#### c. Rounding Method

i. Entitlement Rounding – rounding method for entitlement



- No Rounding (Default)
- Round to nearest 1 / 0.5 / 0.1
- Round up to nearest 1 / 0.5 / 0.1
- Round down to nearest 1 / 0.5 / 0.1

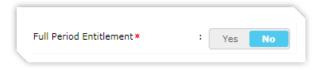
• Round to 1 when more than or equal to certain value, round down to 0 when less that the value



- ii. Apply Rounding To
  - All Year Entitlement or,
  - First Year Entitlement Only



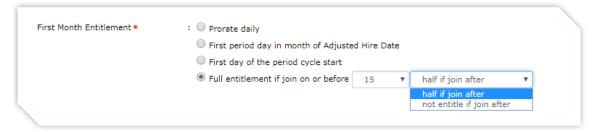
- d. Entitlement Proration Setting
  - i. Full Period Entitlement whether to prorate or not



- Eg: Medical Leave, entitlement is fully given without prorated for new hire / resigned staff
- ii. <u>Complete Month Entitlement</u> When employee's resignation date is updated, if employee does not work for full month, the month is not included in entitlement calculation.



- Employee joined on 2016-01-08, resigned on 2017-12-06, no. of servicing month is 10 months.
- Employee joined on 2016-01-08, resigned on 2017-12-07, no. of servicing month is 11 months.
- 2016-01-08 to 2016-02-07 is considered as 1 completed month.
- iii. <u>First Month Entitlement</u> entitlement proration calculation for **new hired** employee
  - \* Not applicable if Full Period Entitlement or Complete Month Entitlement is ON



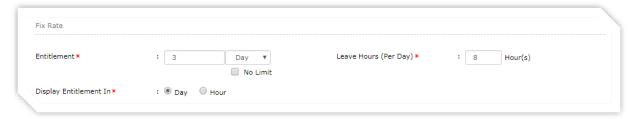
iv. <u>Last Month Entitlement</u> – entitlement proration calculation for **resigned** employee

#### \* Not applicable if Full Period Entitlement or Complete Month Entitlement is ON



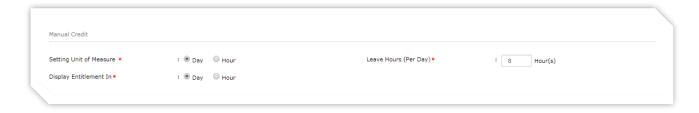
#### Lifetime Leave

- a. Entitlement Reference Date \* NOT APPLICABLE for Lifetime Leave
- b. Fix Rate Setting



- i. <u>Entitlement</u> no. of days of entitlement for the period cycle
- ii. <u>Leave Hours (Per Day)</u> Entitlement is given in how many hours per day
  - Default is 8 hours per day.
  - This setting is important for Hourly Leave.
- iii. Display Entitlement In Show leave type entitlement in Day / Hour in all the screen
- c. Proration Setting \* NOT APPLICABLE for lifetime Leave
- d. Entitlement Proration Setting \* NOT APPLICABLE for Lifetime Leave

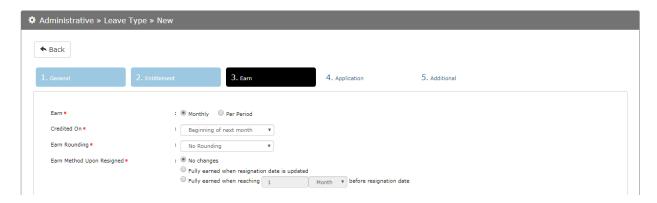
#### Manual Credit



- a. Setting Unit of Measure Entitlement is given in Day / Hour
- b. Leave Hours (Per Day) Entitlement is given in hours per day
  - i. Default is 8 hours per day.
  - ii. This setting is important for Hourly Leave.
    - For 12 hours shift, this field must set to 12 hours as well
- c. Display Entitlement In Show leave type entitlement in Day / Hour in all the screen
- \* Other setting like proration, rounding NOT APPLICABLE for Manual Credit Leave

#### 3. Earnd

Per Service Length or Fix Rate (non-lifetime leave)



- a. Earned monthly earned or earned by leave period
- b. Credited on when is the earned leave happens
  - i. Monthly Earned



ii. Per Period Earned



c. **Minimum service length to have leave earned** – to worked at minimum of days to start earning time off



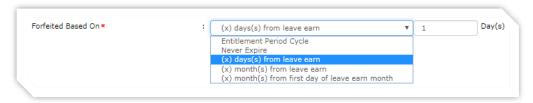
d. Earned Rounding – earned rounding method



#### e. Earned Method upon Resigned

	Earn Method Upon Resigned * : O No changes O Fully earned when resignation date is updated						
		Fully earned when reaching	1	Month	۳	before resignation date	
L				Month Day			

- i. No changes following normal earning method
- ii. Fully earned once resignation date is set
- iii. Fully earned when time is reaching certain Month / Day before resignation date
- f. Forfeited Based On forfeited method for the earned leave

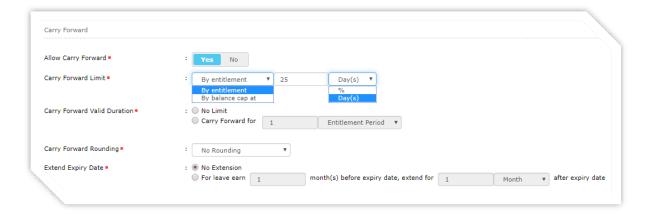


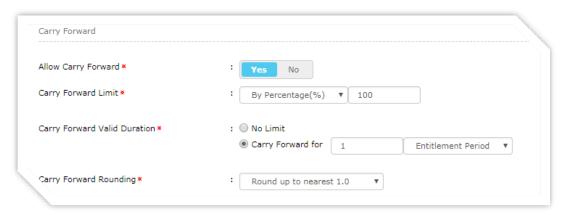
- i. Entitlement Leave Period Cycle E.g. 2017 Annual Leave earned will be forfeited at the end of year.
- ii. Never Expire Leave balance will not expired.
- iii. Leave will be forfeited after certain days of leave earned
- iv. Leave will be forfeited after certain months of leave earned
  - E.g.: leave earned in 2017-07-08 will be forfeited on 2017-08-08 if (x) value is set to 1 month
- v. Leave will be forfeited after certain months from the month of leave earned.
  - E.g.: leave earned in 2017-07-08 will be forfeited on 2017-08-01 if (x) value is set to 1 month
- g. **Extend Expiry Date** whether to extend the expiry date.



- i. Used for leave that not allow carry forward
- ii. \* ONLY APPLICABLE for leave which earned by Entitled Leave Period Cycle
- iii. When extension is turned ON, carry forward is not allowed
- iv. Scenario:
  - Leave earned at the beginning of next month and carry forward is not allowed, all Dec's leave which to be earned next year Jan will be forfeited (assuming leave period controlled by calendar year)
  - Thus, this control can be set to extend the leave which earn for Dec to extend for another 3 more months

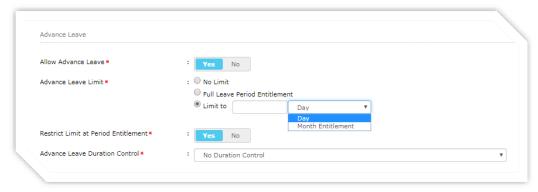
h. **Carry Forward** – brought forward balance when leave is forfeited \* <u>APPLICABLE ONLY</u> for forfeited method base on Entitlement Cycle and No Extension on the expiry date



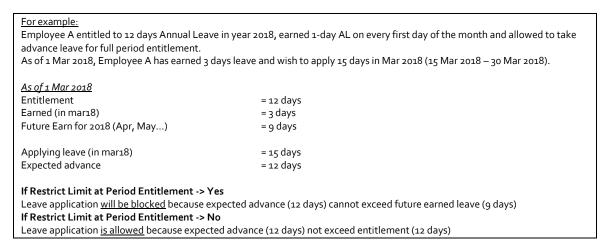


- i. Allow Carry Forward turn on / off carry forward
- ii. <u>Carry Forward Limit</u> set limit for carry forward leave. \* <u>APPLICABLE ONLY</u> if carry forward is allowed
  - By entitlement (maximum carry forward per period): percentage / days
  - By balance cap at days (maximum carry forward base on balance, regardless of leave period)
- iii. <u>Carry Forward Valid Duration</u> how long the bring forward leave last.
  - No Limit last forever
  - Last for certain no. of Entitlement Period / Month / Day
- iv. Carry Forward Rounding option to round the carry forward value
  - No Rounding
  - Round to nearest 1 or 0.5 / 0.1
  - Round up to nearest 1 or 0.5 / 0.1
  - Round down to nearest 1 or 0.5 / 0.1

i. **Advance Leave** – or called as leave predictions. Turn ON advance leave when employee can apply future leave within the leave year.



- i. Allow Advance Leave turn on / off advance leave
- ii. Advance Leave Limit limit the no. of advance leave
  - No Limit no restriction.
  - Full Leave Period Entitlement –may advance annual leave but not to exceed the amount the employee would accrue within the leave year. E.g.: employees have 12 days entitlement but to be earned monthly, he / she can apply for 12 days leave in January, utilizing the leave which to be earned on Feb, Mar etc. However, he / she cannot go on leave for more than 12 days in the entitlement period.
- iii. Restrict Limit at Period Entitlement
  - Yes control advance limit to be capped within leave period
  - No advance limit depends on value set in (ii)

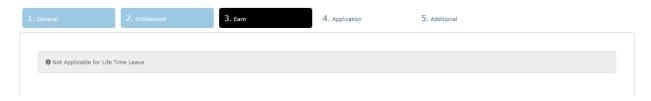


iv. <u>Advance Leave Duration Control</u> – controlling time for the advance leave to effective when balance is not enough for application

		Y	_
Advance Leave Method *	: (x) months from submission date  ▼	(x) value	
	No Duration Control		
	(x) months from submission date		
	(x) months from submission month		
	(x) days from submission date		
	(x) months from submission date and leave date is (y) months from next period start date		
	(x) months from submission month and leave date is (y) months from next period start date		
	<ul><li>(x) days from submission date and leave date is (y) months from next period start date</li></ul>		
	Within specific date		

- No Duration Control can apply for advance leave anytime.
- Certain months from submission date e.g.: setup at 3 months, employee allow to apply leave 3 month before the submission date. Submission date is 4<sup>th</sup> of March, can only apply any leave on or before 3<sup>rd</sup> of Jun, but no later than that.
- Certain months from submission month e.g.: setup at 3 months, employee can only apply leave that less than 3 months <u>from the month of</u> <u>the date submitted</u>. Submission date is March 04, can only apply any vacation on or before May 31, but no later than that
- Certain days from submission date e.g.: setup at 7 days, employee can only apply vacation leave 1 week before the submission date.
- Certain months from submission date and leave date is (y) months from next period start date. Advance leave is allowed for next leave period.
   E.g.: x set at 3 months, y set as 2 months, employee can only apply leave that less than 3 month from the submission date & the vacation date is on the next leave period no later than 2 months from the next start date of leave period (assuming entitlement is based on calendar year).
  - E.g.: Submission date is Dec 04; vacation is on next year Feb 20 (fulfilling 3 months gaps between submission date and vacation date and vacation is within 2 months from next leave cycle start date)
- Certain months from submission month and leave date is (y) months from next period start date
- Certain days from submission month and leave date is (y) months from next period start date
- Within specific date

#### Fix Rate (lifetime Leave)



\* **Earn** section is <u>NOT APPLICABLE</u> for Per Lifetime Leave

#### Manual Credit



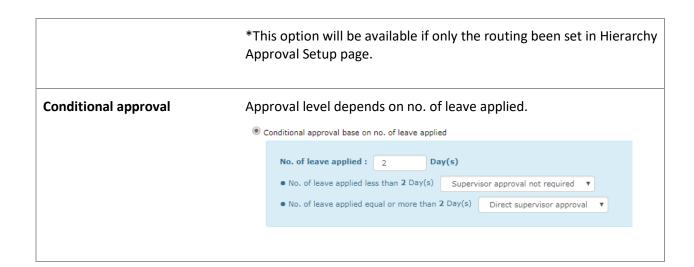
\* **Earn** section is <u>NOT APPLICABLE</u> for Manual Credit Leave

# 4. Application

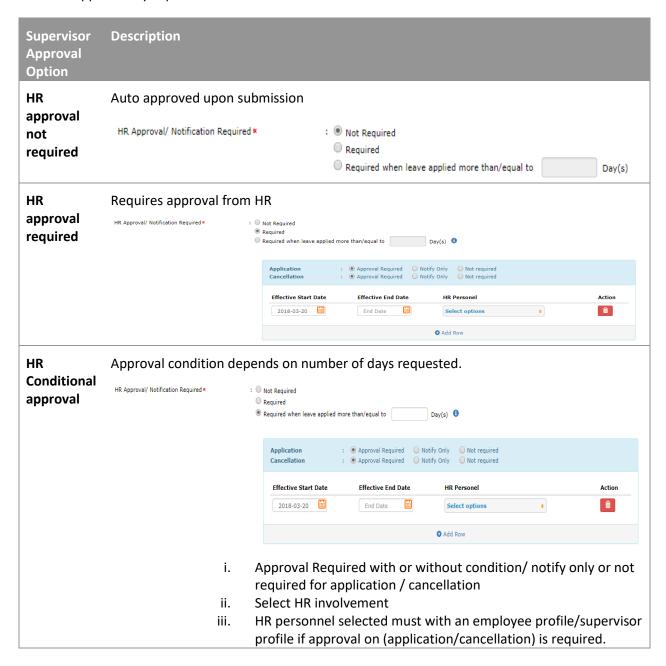
Supervisor Approval *	<ul> <li>Supervisor approval not required</li> <li>Direct supervisor approval</li> <li>Levelling approval</li> </ul>
HR Approval/ Notification Required *	Limit approval     Conditional approval base on no. of leave applied       Not Required
	Required  Required when leave applied more than/equal to  Day(s)
Emergency Leave Tracking *	: Yes No
Application Consumption Control	
Include Non Working Day in Leave Duration★	:   Workday Only  Include : Off Day Rest Day Public Holiday
Application Method on Complete Working Day*	: ☑ Full Day ☑ Half Day ☐ Hourly
Application Method on Half Working Day *	: ☑ Full Day ☑ Half Day ☐ Hourly
Minimum Days Per Application	: No Minimum Day(s)    ✓ No Minimum
Maximum Days Per Application	: No Maximum Day(s)    ✓ No Maximum
Maximum Application Per Period Cycle	: No Limit

## a. **Supervisor Approval** – supervisor approval routes

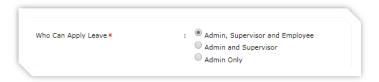
Supervisor Approval Option	Description
Supervisor approval not required	Auto approved upon submission
Direct supervisor approval	Require approval from direct supervisor
Levelling approval	Require approval from 2/3/more levels of hierarchy
Limit approval	Approval route base on the setting of Hierarchy Approval Setup



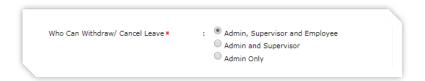
b. **HR Approval / Notification** – HR involvement when leave request / cancellation has been approved by supervision.



c. Who Can Apply Leave – control which employee can submit application of certain types of leave. Only admin, or admin / supervisor, or no restriction



d. **Who Can Withdraw / Cancel Leave** – control which employee can withdraw or cancel certain types of leave. Only admin, or admin / supervisor, or no restriction

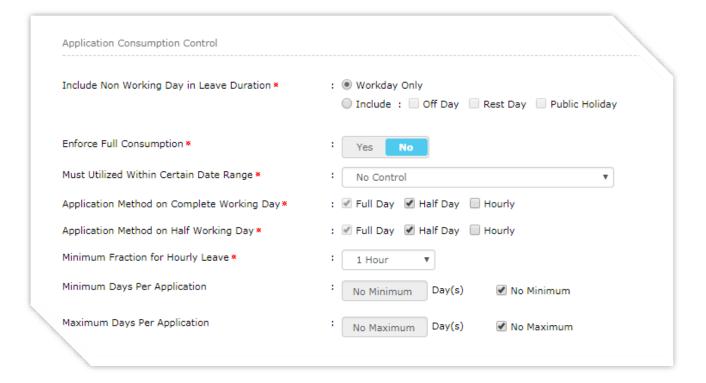


e. **Emergency Leave Control** – turn on emergency checking when minimum number of days is required to apply EL.



i. Minimum Prior Notice – leave must be applied before / after certain working / calendar day. Block or just flag as emergency.

#### f. Application Consumption Control



- i. <u>Include Non-Working Day in Leave Duration</u> whether to deduct leave balance when leave is applied Off Day / Rest Day/ Public Holiday
- ii. <u>Enforce Full Consumption</u> whether the leave usage is forced to spent at once.
   E.g.: maternity leave of 60 days must be fully consumed. If 50 days has been taken only, balance forced to be forfeited
- iii. <u>Must Utilized Within Certain Date Range</u> leave must be utilized within certain number of days/ month from the first application date.
  - \* APPLICABLE ONLY to Fix Rate entitlement with Per Lifetime cycle and if Enforce Full Consumption is turned off
- iv. <u>Application Method on Complete Working Day</u> Leave taken method on full working day. Whether leave applied in hourly/half day or must be in full day.
  - \* NOT APPLICABLE if Enforce Full Consumption is turned on.
- v. <u>Application Method on Half Working Day</u> Leave taken method on half working day. Whether leave can be applied in hourly or half day or must be in full. If only Full Day is allowed, full day of leave balance will be deducted leave applied on half working day. Half working day is specified on Calendar Profile Setup.
  - \* NOT APPLICABLE if Enforce Full Consumption is turned on.
- vi. <u>Minimum Days / Hours Per Application</u> e.g. can set as 0.25 days as minimum which equivalent to 2 hours for 8 hours shift
  - \* **NOT APPLICABLE** if Enforce Full Consumption is turned on.
- vii. <u>Maximum Days / Hours Per Application</u> e.g. capped at 3 days per application
  - \* NOT APPLICABLE if Enforce Full Consumption is turned on.

#### g. Leave Date Control

 Allow Leave Application Starting From – when employee can start to utilize the leave

Allow Leave Application Starting From ▼	:   No Control		
	Upon Confirmation		
	Month(s) ▼ after Hire Date ▼ , No Confirmation Required	*	
	No Confirmation Required		
	OR Upon Confirmation AND Confirmed		
		_	

ii. <u>Restrict Leave Application on Resignation</u> – when employee's resignation date is updated, can the employee still able to apply for the leave

П			
	Restrict Leave Application on Resignation	:   No Restriction  Not allow to apply leave once Resignation Date is updated	

iii. <u>Allow Future Leave Application</u> – whether employees can apply for future leave date.



- No no restriction
- Future leave not allowed
- Not allowed except it is next working day
- Not allowed to apply next leave period
- Must within range in (x) months after current date
- Must within range in (x) months from first day of current month
- Must within range in (x) days after current date
- iv. <u>Back Dated Application</u> restrict employee from apply leave that after exceed certain no. of months / days



v. <u>Past Leave Cancellation</u> – restrict employee from cancel leave after certain number of months / days

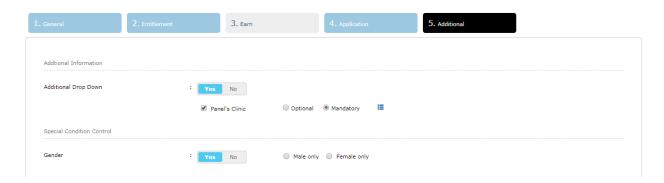
Past Leave Cancellation	: O No Restriction				
	<ul><li>Within range of</li></ul>	1	Month(s) Before Current Date	٧	1
			Month(s) Before Current Date		1
			Month(s) Before Current Month Day(s) Before Current Date		١
			Day of the month		

vi. <u>Gap for Next Leave Transaction</u> – set a range of days to allow employee to apply the same type of leave on the next time.

Gap For N	ext Leave Transaction	No Restriction     With gap restriction	Months between on leave date must more than 2  Months between on leave date must more than
			Months between on leave date must more than Months between on leave month must more than Days between on leave date must be more than
vii.	Alleria de la Particional		
VII.	Attachment Required	– is attachment	required or not
VII.	Attachment Required  Attachment Required	- is attachment	required or not  Mandatory

#### 5. Additional

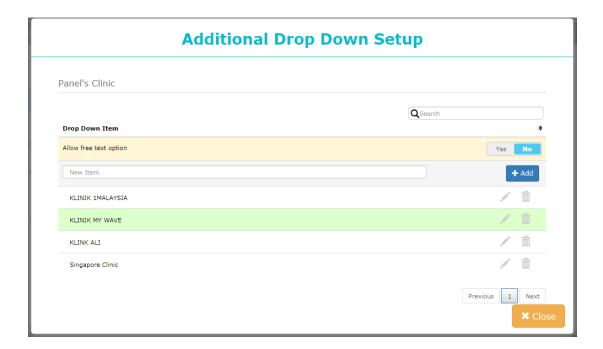
Remarks Required



a. **Additional Drop Down** – prompt user to select from the dropdown when applying leave.

Click to view / managing the drop down list

: Optional



b. **Special Condition Control** – specify if the leave type is applicable for certain gender only.

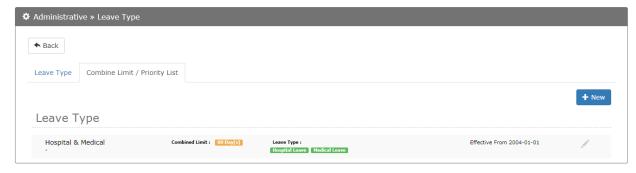
### **COMBINE LIMIT / PRIORITY SETUP**

#### Add New Combine Limit / Set Priority List

1. Go to Administrative > Leave Policy, click on "Leave Type".



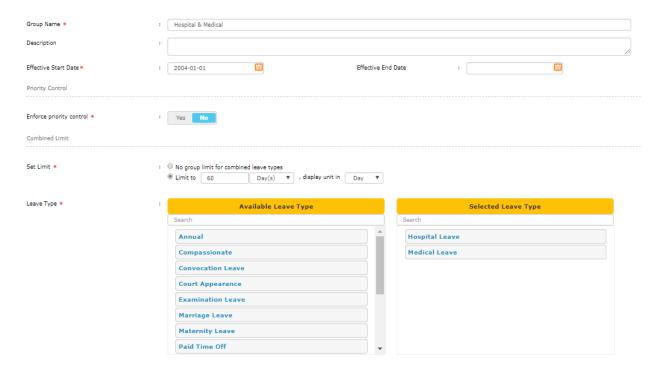
2. Go to 2<sup>nd</sup> Tab "Combine Limit / Priority List" and click "New" to add.



- 3. Fill in the detail and click "Save".
  - a. Group Name must be unique
  - b. **Description** for the combine limit / priority setting
  - c. **Effective Start Date** & **Effective End Date** (if expected to be ended on certain date)
  - d. Enforce Priority Control
    - i. Yes Compulsory to utilize the leave <u>following the sequence</u> displayed in the box of "Selected Leave Type"
    - ii. No Not to follow the sequence to utilize the leave type.

#### e. Set Limit

- i. No Group Limit leave days that can be applied follow the leave type itself
- ii. Limit to certain no. of days / hours, display the leave days in unit of Day / Hour
- f. Leave Type choose the leave type to combine limit / grouping.
  - i. Only leave type that having same cycle can be grouped together.
  - ii. Same leave type only can be grouped to 1 group.
  - iii. Leave Type **sequence** is important if Enforce Priority Control is ON. E.g.: Hospital Leave must be utilized first then only followed by Medical Leave.



#### **Edit Combine Limit / Priority List**

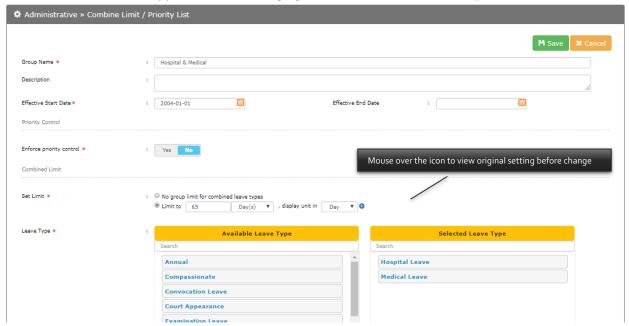
1. Go to Administrative > Leave Policy, click on "Leave Type".



2. Go to 2<sup>nd</sup> Tab "Combine Limit / Priority List" and click "Group" to edit.



3. Save button will appeared when changing the control. Click "Save" to update.



#### **Delete Combine Limit / Priority List**

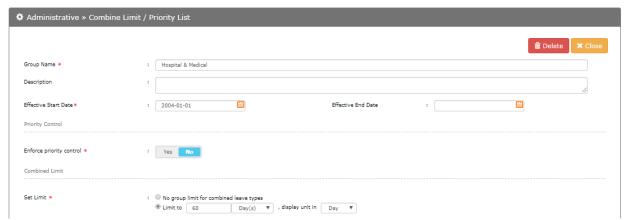
1. Go to Administrative > Leave Policy, click on "Leave Type".



2. Go to 2<sup>nd</sup> Tab "Combine Limit / Priority List" and click "Group" to delete.



3. Click "Delete" to remove.



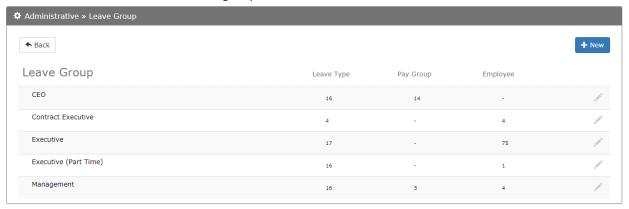
# **LEAVE GROUP**

## **Add New Leave Group**

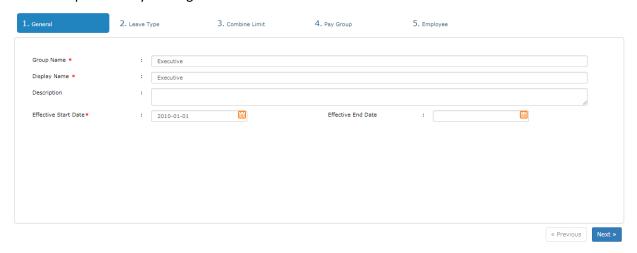
1. Go to Administrative > Leave Policy, click "Leave Group".



2. Click "New" to add new leave group.



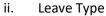
3. Fill up all tabs by clicking on "Next" or the Tab itself.



#### i. General Tab:

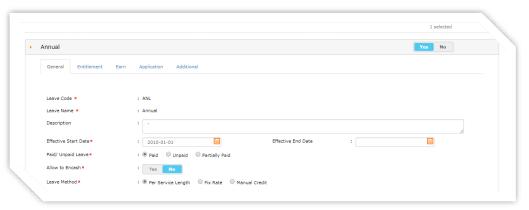


- a. Group Name Leave Group Name, must be unique
- b. Display Name Leave Group Display Name
- c. **Description** Description of leave group
- d. Effective Start Date Date to activate and deactivate the leave group





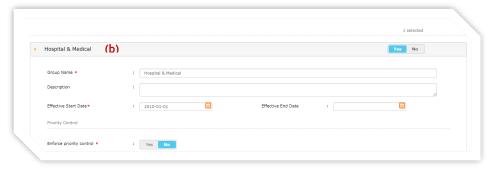
- a. Select "Yes" to add leave type to leave group
- Click leave type to view detail. You can modify the control for different Leave Group entitlement / control. Changes can be made only for leave type that added to leave group



#### iii. Combine Limit



- a. Select Yes to add Combine Limit to the leave group
- b. Click on the combined group name to view details. You can modify the control for different Leave Group entitlement / control. Changes can be made only for combined group that added to the leave group

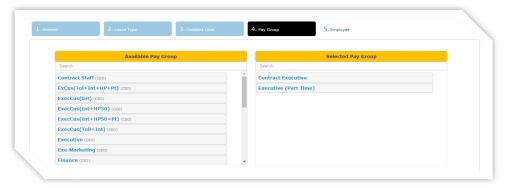


Leave type that selected to be combined must be added in the leave group.
 E.g.: if Hospital Leave and Medical Leave are chosen, leave group must include these 2 types of leave.

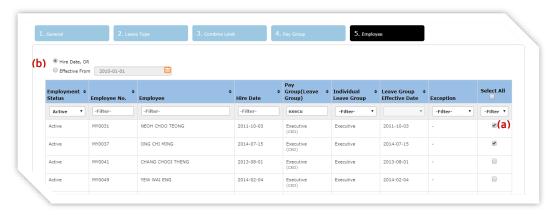


# iv. Pay Group

a. Drag pay group from Available Pay Group to Selected Pay Group to set the leave group by default.



# v. Employee



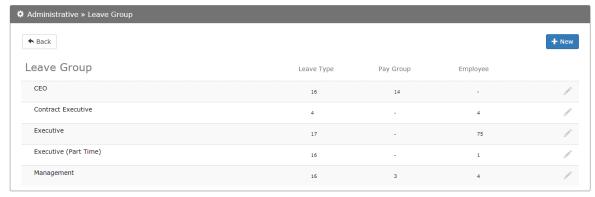
- a. Select employee to be assigned to the leave group
- b. Select the assignment date: based on individual hire date or specific start date
- 4. Click on the "Save" after completion

#### **Edit Leave Group**

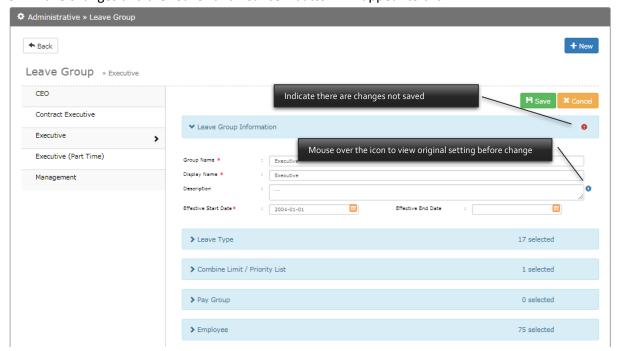
1. Go to Administrative > Leave Policy, click on "Leave Group".



2. Click on the leave group to edit.



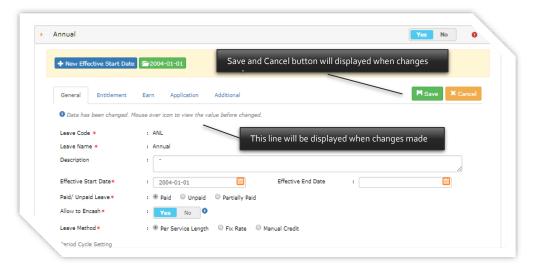
3. Make changes and the "Save" and "Cancel" button will appear to click.



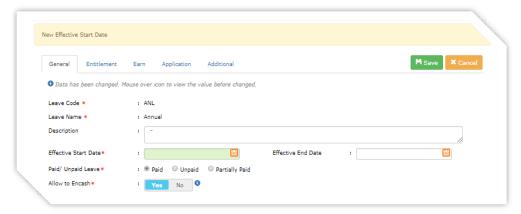
- a. Leave Group Information
  - Change name of leave group, display name, description and effective date range
- b. Leave Type



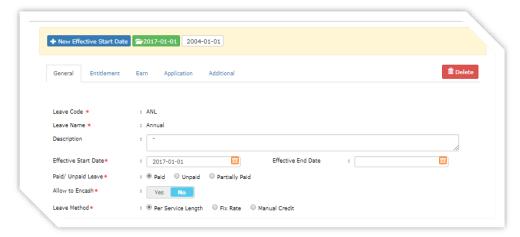
- Click on "Yes" to add leave type to leave group or "No" to exclude leave type from the leave group
- Expand the leave type to view the details. You can make changes on every leave group differently and save to update. Certain control like leave code, leave name, period cycle setting cannot be overwritten on leave group level.



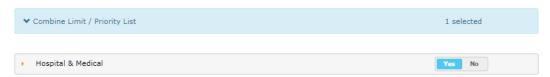
• Click to determine activation date of the leave type control.



 Click on the date to view leave type control. You can delete the setting for the selected date by clicking on

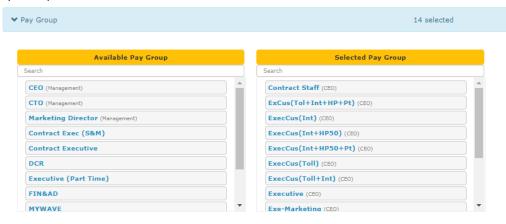


c. Combine Limit



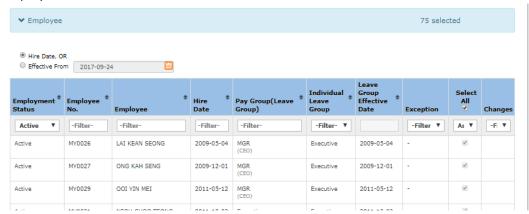
Click on the Combine Limit grouping to update

#### d. Pay Group



 Click on the pay group view / update pay group's default leave group to the selected leave group

#### e. Employee



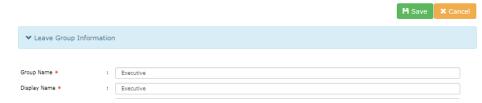
- Click on the Employee to view employee assigned to this leave group
- The list shows employees that have been assigned to the leave group by default setting. Change the dropdown to view all employee or assign other employees to the selected leave group



Mark the checkbox to assign employee to leave group.
Indicate the employee is selected to be added to the leave group.



• Click "Save" on the top of the leave group to save the changes made.



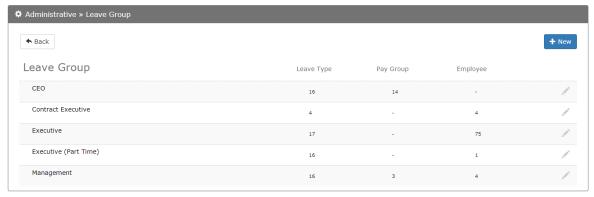
• Employee being assigned to the selected leave group cannot be removed. However, if user want to update a batch of employees to another leave group, user may add employee to the targeted leave group.

### **Delete Leave Group**

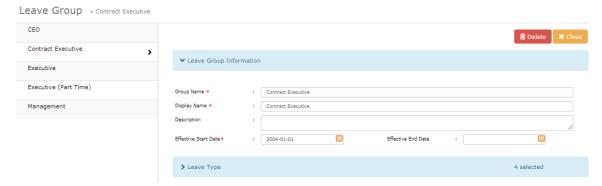
1. Go to Administrative > Leave Policy, click on "Leave Group"



2. Click on the leave group to delete.



3. Click "Delete" button.



i. Leave Group cannot be removed if there is employee assigned to the leave group

# **CREDIT LEAVE BY HOURLY/DAILY**

**Overtime Compensatory Leave Credit** 

## **Credit Hourly Leave Type**

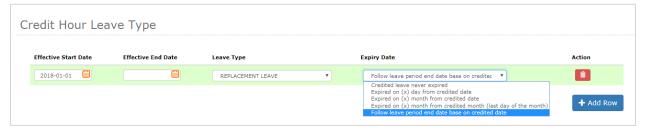
1. Go to Administrative > Leave Policy, click on "Credit Hour Leave Type"



2. Click + Add Row to set



3. Insert effective date, leave type and credit expiry method then click "Save"



Expiry Date Option	Description
Credited leave never expired	Credited leave will never be expired
Expired on (x) day from credited date	Credited leave will be expired after certain days starting from date credited.
Expired on (x) month from credited date	Credited leave will be expired after certain months from the date credited

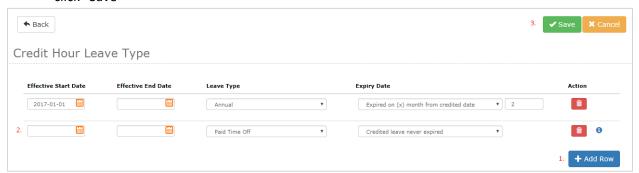
	Eg: (x) is set as 2 months, leave credited on 2017-06-10 will be expired on 2017-08-09
Expired on (x) month from credited month (last day of the month)	Credited leave will be expired after specific months from credited month.
	Eg: (x) is set as 2 months, leave credited on 2017-06-10 will be expired on 2017-08-31
Follow leave period end date based on credited date	Credited leave will be expired on end date of leave cycle.
	Eg: Leave cycle is from 01 Jan to 31 Dec, leave credited will expired on 31 Dec of the credited year

## **Amend types of Hourly Leave Credited**

1. Go to Administrative > Leave Policy, click on "Credit Hour Leave Type"

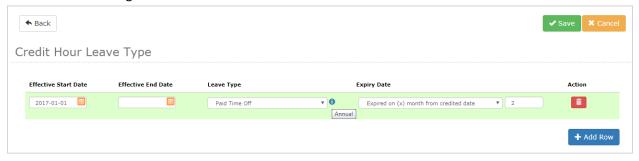


2. To update changes which effective date, click click "Save" and insert new effective date, then



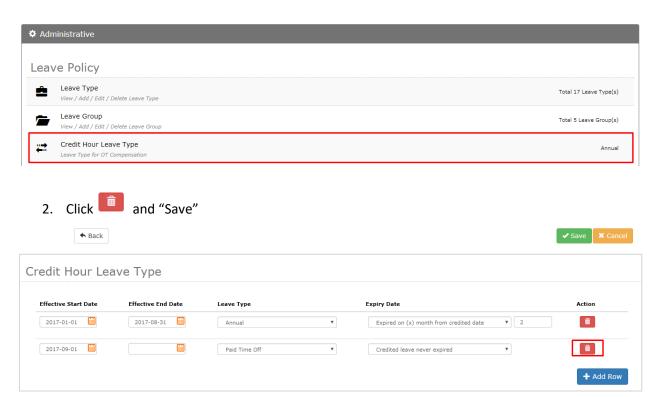
- Date range between rows cannot be overlapped
- 3. To change on the same effective date, update the value in every row then click "Save".

1 Indicate the field has been changed and you can mouse over to view the original value before change.



## **Delete types of Hourly Leave Credited**

1. Go to Administrative > Leave Policy, click "Credit Hour Leave Type"



# HALF DAY/HOURLY LEAVE CONTROL

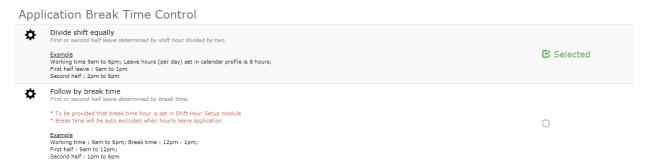
Setup for start & end time of leave request when applying half day or hourly leave.

#### Application break time control method

1. Go to Administrative > Leave Policy, click on "Application Break Time Control"



2. Choose the break time control by clicking on the check box



Break Time Control	Description
Divide shift equally	First or second half leave determined by shift hour divided by two.
	Example:
	Working time 9am to 6pm; Leave hours (per day) set in calendar profile is 8 hours;
	First half leave: 9am to 1pm
	Second half: 2pm to 6pm
Follow by break time	First or second half leave determined by break time.
	* To be provided if break time hour is set in Shift Hour Setup
	* Break time will be auto excluded when hourly leave application

# Example:

Working time: 9am to 6pm; Break time: 12pm - 1pm;

First half: 9am to 12pm; Second half: 1pm to 6pm

# \* <u>Note</u>:

Only next application will take effects.

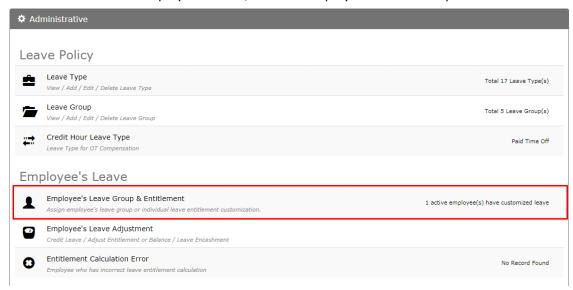
Existing application records (including added to list status) will not be updated.

# **EMPLOYEE'S LEAVE GROUP & ENTITLEMENT**

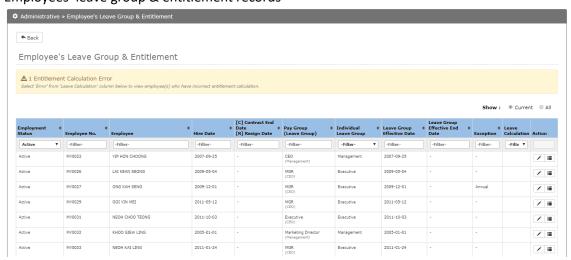
View / assign employee's leave group or customize leave entitlement individually

## View employee's leave group

1. Go to Administrative >Employee's Leave, click on "Employee's Leave Group & Entitlement"



2. Employees' leave group & entitlement records



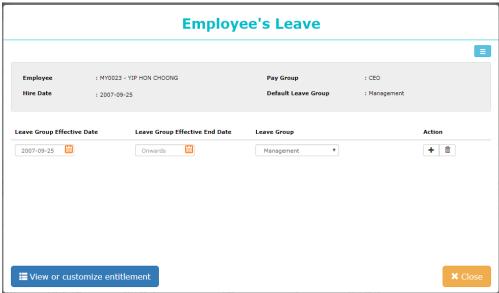
i. Data by defaults shows the employee's current entitlement. To show all the historical records (past and future assign list), click show "All".



ii. Active employee is shown by default. Select/insert search key to apply filters.



iii. Click on to view / edit employee's leave group.



iv. To check error on Entitlement Calculation, select "Error" from the column of Leave Calculation. Click on the 'alert' icon to view the detail. Error will be displayed if there's unsuccessful entitlement calculation from batch update.

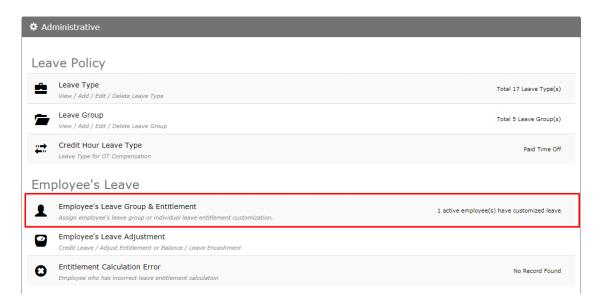
Eg: Action of reducing entitlement of Employee A, causing leave taken by Employee A has exceeds the entitlement. Other employees' leave entitlement will be calculated accordingly but not for this employee.

System will remain the Leave entilement for Employee A like before, errors will shows not tally with the new setting in leave group.

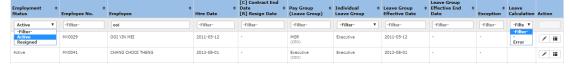


#### Add / Edit / Remove employee's leave group

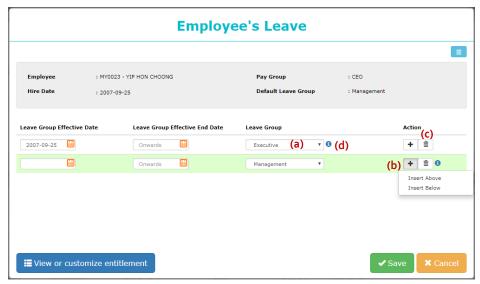
1. Go to Administrative >Employee's Leave, click on "Employee's Leave Group & Entitlement"



2. Click on to view / edit employee's leave group



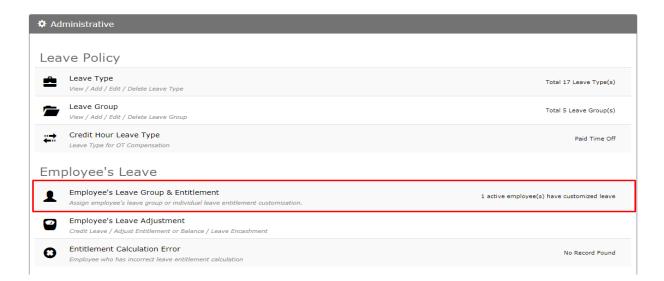
#### 3. Employee's Leave



- a. To edit make changes on the records and click "Save"
- b. **To add new effective date**: click and choose "Insert Above" to add effective date before the record or "Insert Below" to add effective date after. Update the effective date and leave group, click "Save".
- c. **To remove** click and click "Save"
- d. Mouse over the <sup>1</sup> to view value before changes made
- 4. Click on 
  <sup>■ View or customize entitlement</sup> to view entitled leave type for the employee

### View / Customize employee's leave entitlement

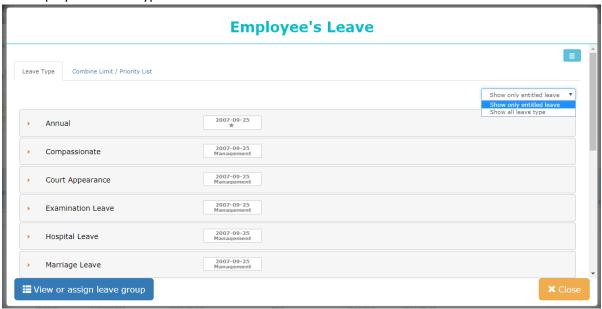
1. Go to Administrative >Employee's Leave, click on "Employee's Leave Group & Entitlement"



2. Click to view / edit employee's entitled leave type



3. Employee's Leave Type Entitlement

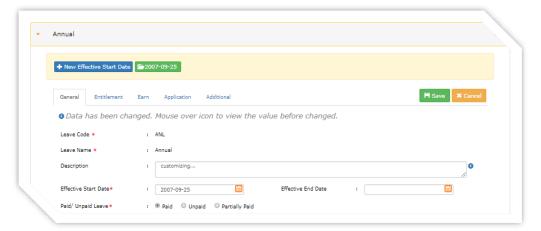


The list shows the entitled leave type of employees by default.
 To view or add certain leave type to specific employee, change the dropdown to "Show all leave type".

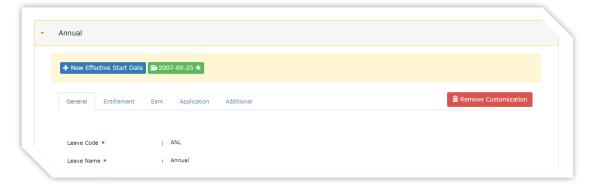


- ii. Click on the leave type to view the setting
- iii. To set customization for the employee

[Note: refer to leave type control for more explanation]



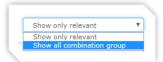
- i. **Effective start from a specific date**: click on + New Effective Start Date to set the new effective start date, modify the value and click "Save".
- ii. Effective date starts on the same date: modify the value and click "Save".
- iv. To remove customize leave entitlement, click entitlement, click to remove the customization and reset based on leave group entitlement (if there is leave group assigned)



4. Employee's Combine Limit / Priority List

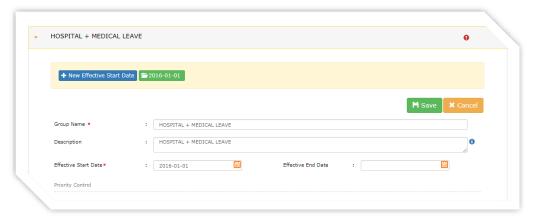


a. The list shows the applicable combine limit / priority list for the employee by default. To view or add Additional Combine Limit/Priority List to specific employee, change the dropdown to "Show all combination group".



- b. Click on the record to view the setting
- c. To set customization for the employee

[Note: refer to Add New Combine Limit / Set Priority List for control setup explanation]



- i. **Effective start from a specific date**: click on + New Effective Start Date to set the new effective start date, modify the value and click "Save".
- ii. **Effective date starts on the same date**: modify the value and click "Save".

# ADJUST EMPLOYEE'S LEAVE BALANCE

## Credit Leave - add / edit / remove

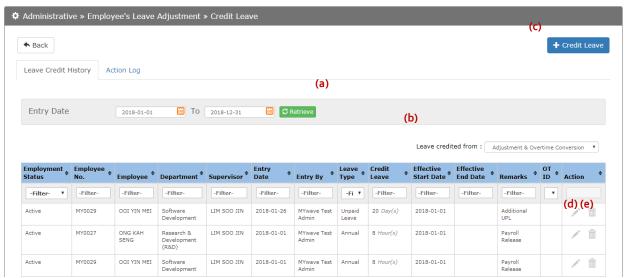
1. Go to Administrative > Leave Policy, click "Employee's Leave Adjustment"



2. Click on "Credit Leave"



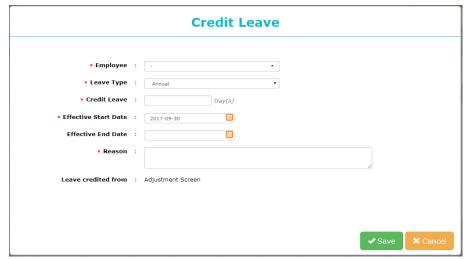
3. Credited leave will be shown after data loaded.



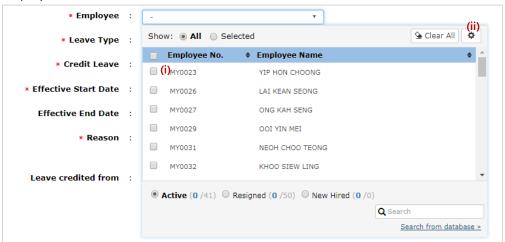
- a. Apply filter on date range
- b. Show leave credited from Adjustment Screen or Converted from OT submission
- c. Click on + Credit Leave to credit leave
- d. Click on to edit credited leave
- e. Click on to remove credited leave

#### Credit Leave

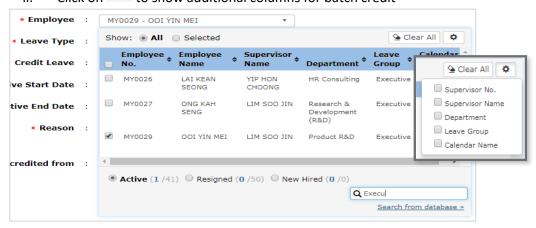
- 1. Click on + Credit Leave to credit leave
- 2. Fill in the details and click "Save"



a. Employee selection:

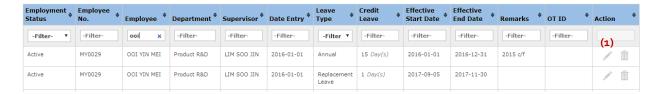


- i. Select employee to credit leave
- ii. Click on to show additional columns for batch credit

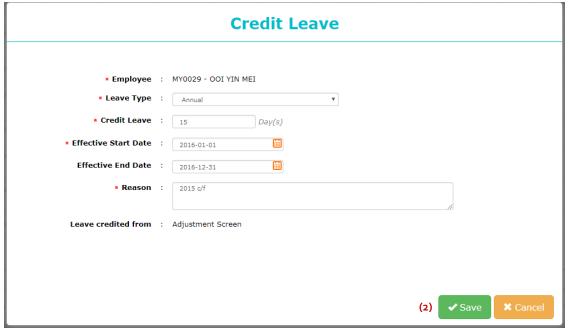


#### Edit Credited Leave

# 1. Click on to edit credited leave



2. Update the details then click "Save"

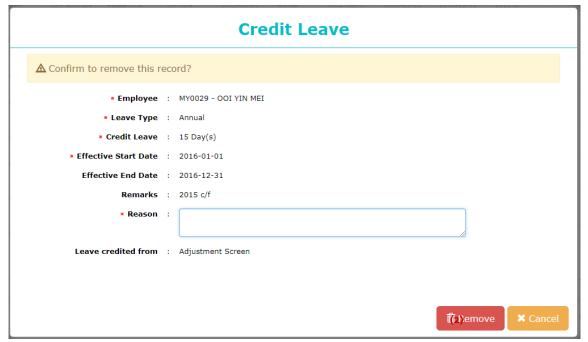


#### Delete Credited Leave

1. Click on in to remove credited leave



2. Insert the reason and click "Remove"



## Adjust Leave Balance - add / edit / remove

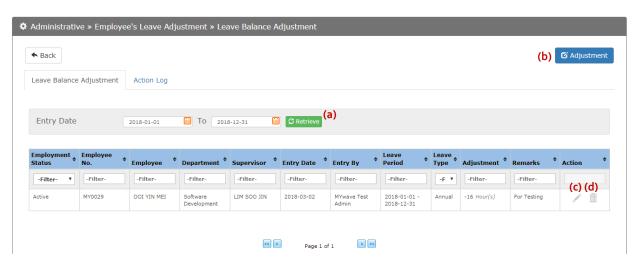
1. Go to Administrative > Leave Policy, click "Employee's Leave Adjustment"



2. Click "Leave Balance Adjustment"



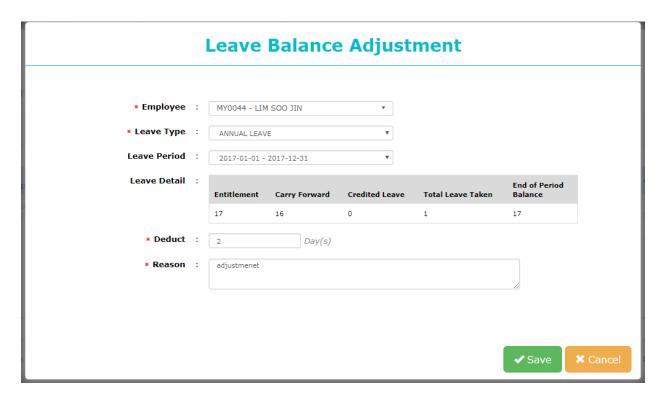
3. Leave adjustment will be shown when loaded.



- a. Filter date range
- b. Click on Adjustment to adjust leave balance
- c. Click on to edit adjusted leave
- d. Click on  $\stackrel{ ext{$\widehat{}}}{ ext{$\widehat{}}}$  to remove adjustment made

# Adjust Leave Balance

- 1. Click on Adjustment to adjust leave balance
- 2. Fill in the details then click "Save"

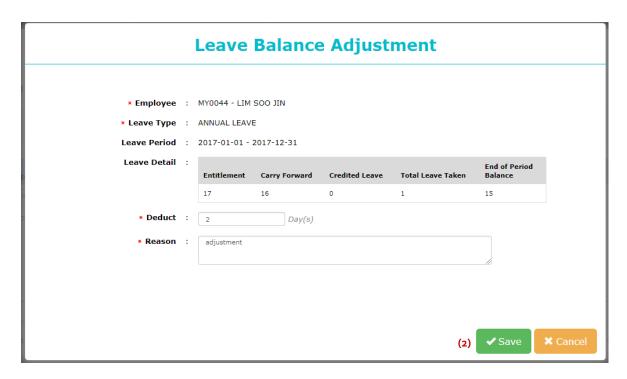


## Edit Adjusted Leave

1. Click on / to edit adjusted leave

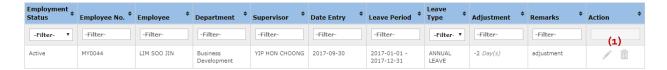


2. Update the details and click "Save"

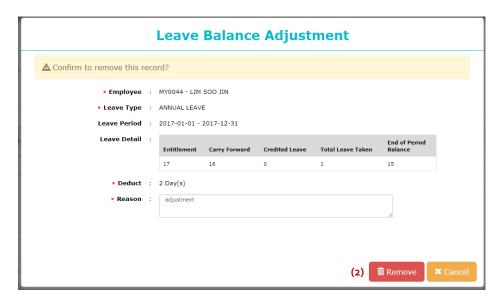


# Delete Adjusted Leave

1. Click on to remove adjusted leave

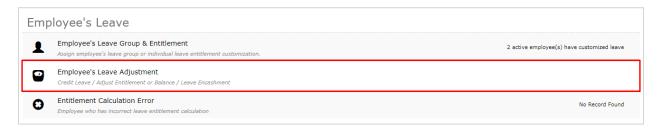


2. Insert the reason and click "Remove"



## Effective Date of Adjusted Leave - add / edit

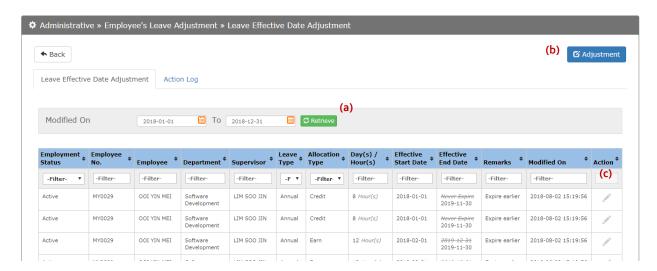
1. Go to Administrative > Leave Policy, click on "Employee's Leave Adjustment"



2. Click on "Leave Effective Date Adjustment"



3. Leave Effective Date Adjustment will be shown when loaded.



- a. Filter date range
- b. Click on dadjust leave effective date
- c. Click on to edit adjusted leave effective date

### Effective Date of Adjust Leave

- 1. Click on Adjustment to adjust leave effective date
- 2. Fill in the details then click "Save"



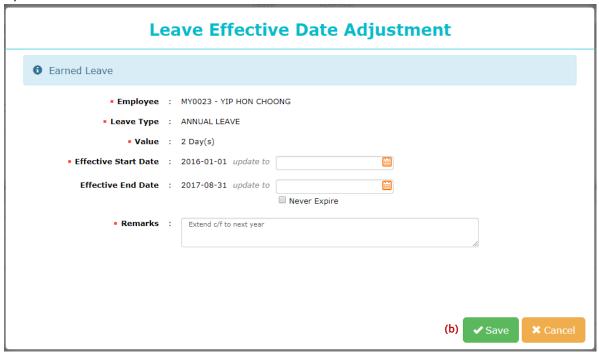
- a. Update start or end date or both. If no changes, leave it blank to remain original setting. Either start date or end date must be changed.
- b. Select which earn records to be updated.
- c. Click "Save" to apply changes made.

## Edit Effective Date of Adjusted Leave

1. Click on to edit adjusted leave date

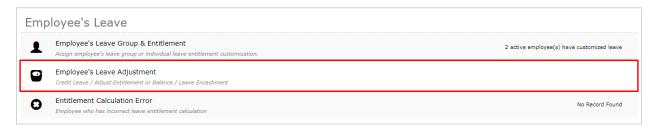


2. Update the details and click "Save"



## Leave Entitlement Adjustment - add / edit / remove

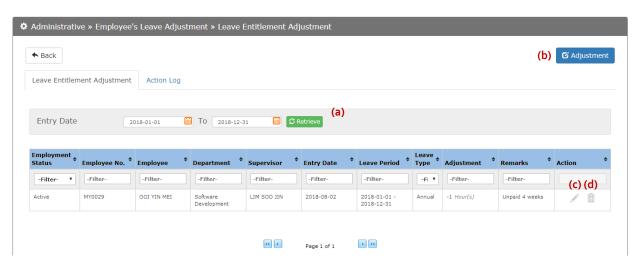
1. Go to Administrative > Leave Policy, click on "Employee's Leave Adjustment"



2. Click on "Leave Entitlement Adjustment"



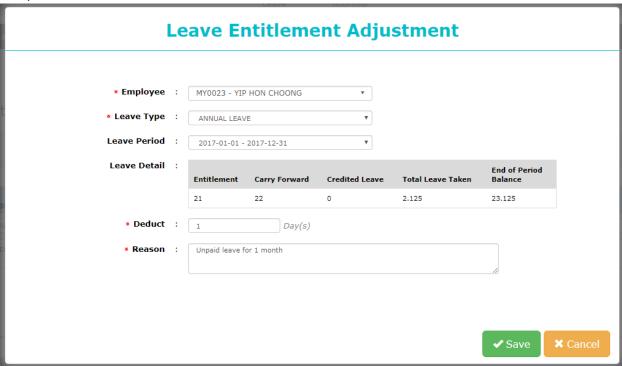
3. Leave entitlement adjustment will be shown when data loaded.



- a. Filter date range
- b. Click Adjustment to adjust leave entitlement
- c. Click to edit adjusted leave entitlement
- d. Click in to remove adjustment made

# Adjust Leave Entitlement

- 1. Click on Adjustment to adjust leave entitlement
- 2. Fill up the details then click "Save"



# Edit Adjusted Leave Entitlement

1. Click to edit adjusted leave entitlement



2. Update the details and click "Save"

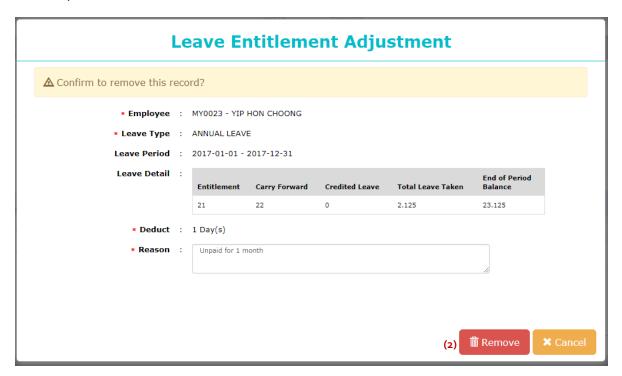


# Delete Adjusted Leave Entitlement

1. Click on in to remove adjusted leave entitlement



2. Fill up the reason and click "Remove"



## Carry Forward Adjustment - add / edit / remove

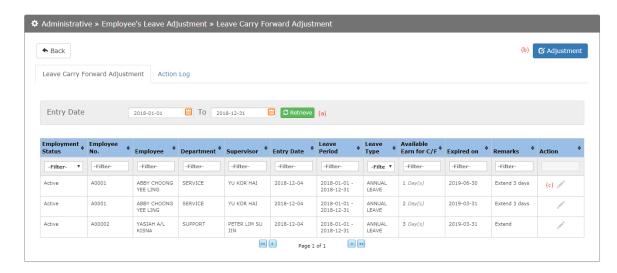
1. Go to Administrative > Leave Policy, click on "Employee's Leave Adjustment"



2. Click on "Leave Carry Forward Adjustment"



3. Carry forward adjustment records will be shown when data loaded.



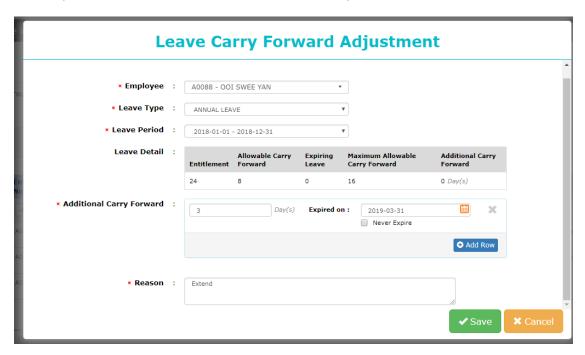
- a. Filter date range
- b. Click on Adjustment to adjust carry forward
- c. Click on does to edit or remove adjusted carry forward leave

# Add Carry Forward Adjustment Leave

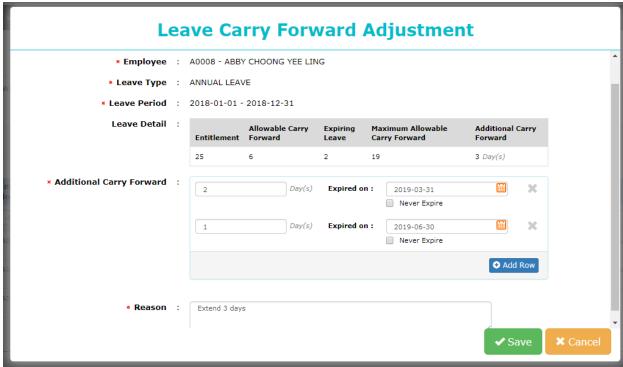
- 1. Click on to adjust carry forward leave
- 2. Fill in the details and click "Save"

### Note:

- \* Total additional carry forward cannot be greater than allowable carry forward maximum value
- \* Expire date must be later than end data of leave cycle

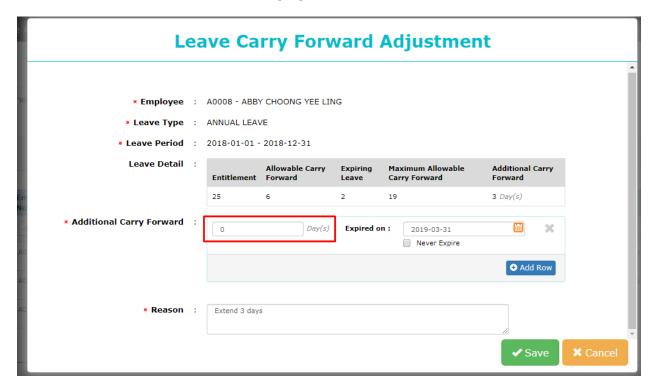


1. Click on / to edit carry forward adjustment



2. Update the details then click "Save"

- 1. Click on to edit carry forward adjustment
- 2. To remove the value, set 0 in the box highlighted below.



3. Update the details then click "Save"

### Leave Encashment - add / edit / remove

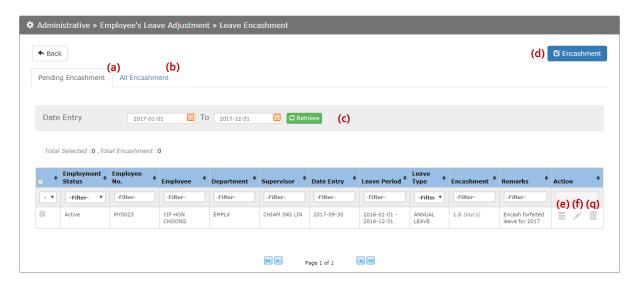
- \* Records cannot be change once date of encashment is set
  - 4. Go to Administrative > Leave Policy, click on "Employee's Leave Adjustment"



5. Click on "Leave Encashment"



6. Leave encashment records will be shown when data loaded.



- a. **Pending Encashment** Tab shows only pending status of encashment records.
- b. All Encashment Tab shows all encashment records.
- c. Filter date range

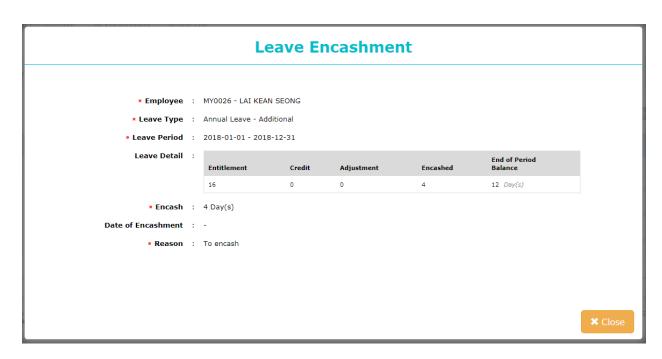
- d. Click on General for leave encashment
- e. Click on = to view encashment details
- f. Click on oto edit encashment
- g. Click on in to remove encashment made
- h. To update encashment date, select the items, insert the encashment date and click "Update".
  - \* Update button will appear only if Leave (Payroll) access is given.



#### View Leave Encashment

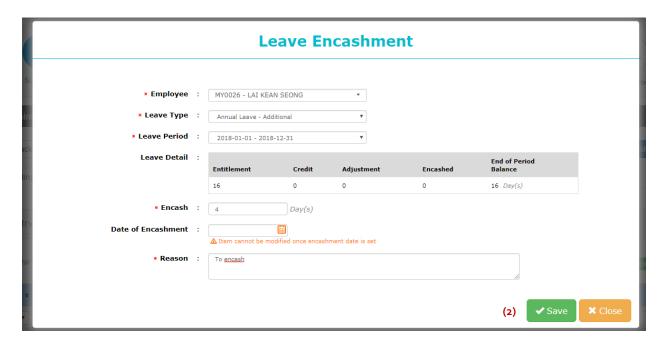
# 1. Click on to adjust leave entitlement





### Leave Encashment

- 1. Click on to adjust leave entitlement
- 2. Fill up the details then click "Save"

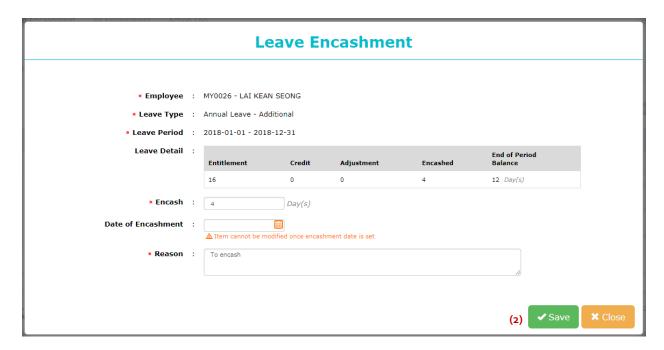


#### Edit Leave Encashment

- \*Encashment record cannot be edited once date is set.
- 1. Click on to edit leave encashment



2. Update the details then click "Save"

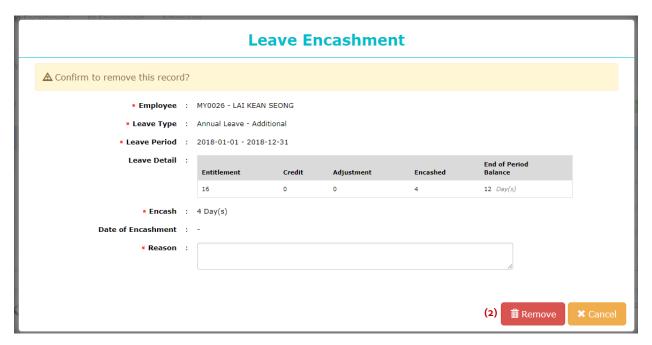


#### Delete Leave Encashment

- \*Encashment record cannot be removed once the date is set.
  - 1. Click on to remove leave encashment



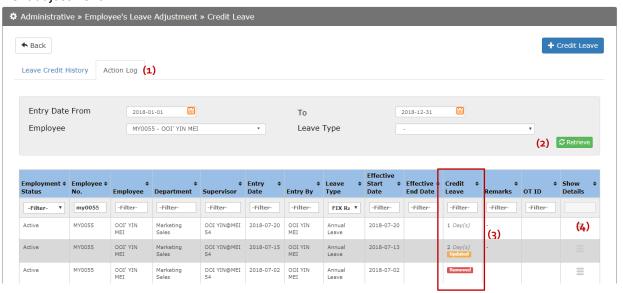
2. Click "Remove" and provide reason.



#### Leave Adjustment - Action Log

To view historical data:

- adjustment made on leave credit
- adjustment on effective date
- entitlement adjustment
- encashment adjustment



- 1. On the screen of Leave Adjustment, click on Action Log tab.
- 2. Apply filter then click "Retrieve"
- 3. "Updated" or "Removed" tag will be shown if the record has been updated / removed before
- 4. Click on the ≡ to view the changes detail



# **ENTITLEMENT CALCULATION ERROR**

i. To check error on Entitlement Calculation, select "Error" from the column of Leave Calculation. Click on the 'alert' icon to view the detail. Error will be displayed if there's unsuccessful entitlement calculation from batch update.

Eg: Action of reducing entitlement of Employee A, causing leave taken by Employee A has exceeds the entitlement. Other employees' leave entitlement will be calculated accordingly but not for this employee.

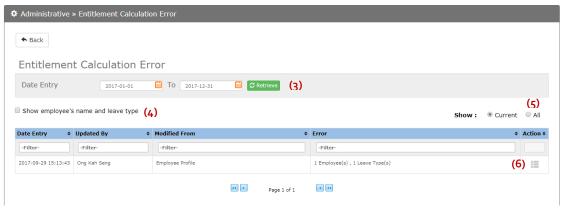
System will remain the Leave entilement for Employee A like before, causing balance not tally with the new setting in leave group.

#### **View Errors on Entitlement Calculation**

1. Go to Administrative > Employee's Leave, click on "Entitlement Calculation Error"



2. Calculation error will be listed.



- 3. Apply Filter date range
- 4. Checkbox to show error together with employee's name



- 5. Checkbox "All" to view all entitlement calculation error, include error that has been fixed. The list by default show sonly current records that having error only.
- 6. Click on to view the details.

# **ADDITIONAL SETUP**

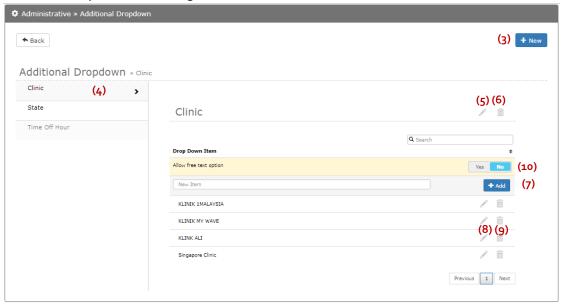
#### **Additional Dropdown Setup**

Sett additional dropdown for leave application.

1. Go to Administrative > Additional Setup, click on "Additional Dropdown Setup"



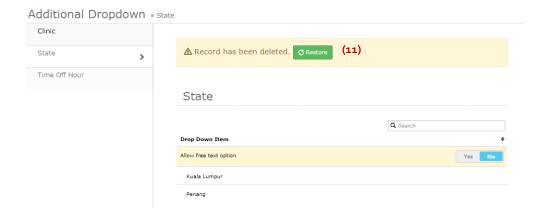
2. Additional dropdown that being created will be shown.



- 3. Click on + New to add new type of dropdown
- 4. Click on the item to view dropdown options
- 5. Click to edit name of dropdown
- 6. Click to remove type of dropdown
- 7. Insert New Item in textbox, click to add new item to the dropdown list
- 8. Click to edit name of dropdown list
- 9. Click to remove item from dropdown list
- 10. Do you allow employee to insert additional item when item is not listed in the dropdown? Select Yes to allow add, No to restrict employee to add and choose only available options.

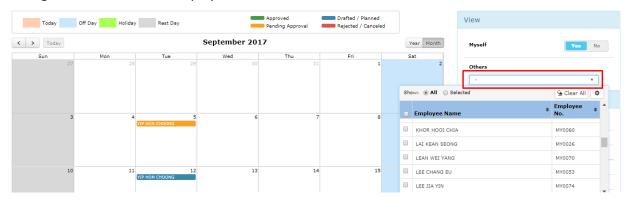


11. Click on Restore to restore deleted item. Types of Dropdown cannot be removed if it has been activated in Leave Type / Leave Group / Employee Customized Leave Type



#### **Employee Holiday Calendar Setup**

Setting to determine which employee can be view the leave calendar.

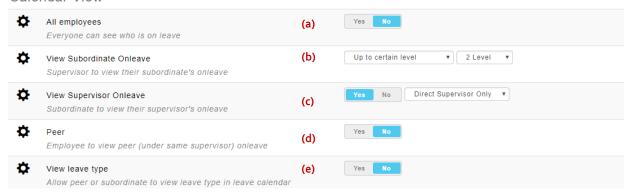


1. Go to Administrative > Additional Setup, click "Calendar View"



2. There are 3 types of control in the calendar view

#### Calendar View



- a. **All Employee** if this setting is being turned on, everyone in the company can view everyone's vacation date.
  - \* Supervisor and Peer control will not applicable if this setting is being turned on
- b. **View Subordinate** to determine how many levels down a supervisor can view their subordinates' vacation record.

Subordinate Option	Description
Direct subordinate only	Direct reporting only.
All subordinate	All subordinates (Direct and indirect reporting).
Up to certain level	2 or 3 reporting levels.

c. **View Supervisor** – to determine whether to allow subordinates to view supervisor's vacation record.

If yes, up to how many level.

Up to certain level

Supervisor Option	Description
Direct supervisor only	Direct reporting supervisor.
All supervisor	All reporting supervisor. No restriction.

d. **Peer** – to determine whether employee can view vacation records of their peers (control by reporting manager)

Peer Option	Description
Same direct supervisor	View peers reported to the same direct supervisor
Same direct supervisor and all of their subordinates	View peers reported to the same direct supervisor and also other subordinates under him/ her.

Up to 2 or 3 reporting levels.

e. **View Leave Type** – if this setting is being turned off, the leave type information for peer/subordinate(s) will not be able to view by them in their leave calendar.

\*This setting will not affect the "Admin" access. The "Admin" will always be able to view

<sup>\*</sup>This setting will not affect the "Admin" access. The "Admin" will always be able to view all employees' Leave Type in the Leave Calendar.

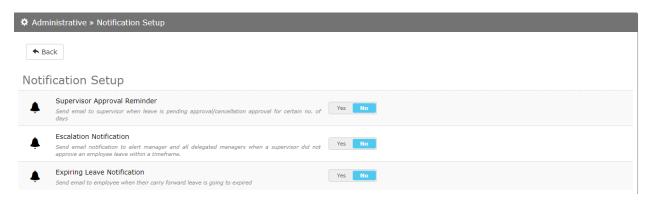
# **NOTIFICATION SETUP**

Setting to control supervisor approval, escalation notification and expiring leave notification of employees.

1. Go to Administrative > Additional Setup, click on "Notification Setup"

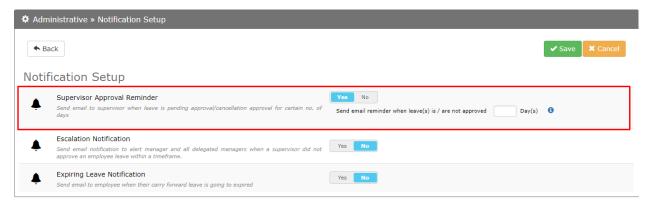


- 2. There are 3 controls for notification setup
  - a. Supervisor Approval Reminder
  - b. Escalation Notification
  - c. Expiring Leave Notification



### **Reminder Emails to Approvers**

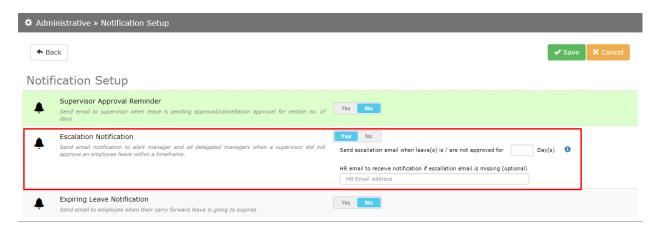
Supervisor Approval Reminder – Setting to send email to supervisor when leave request is pending approval or cancellation request pending approval after certain numbers of days.



• Insert numbers of days in the text box after feature is turned **ON** in the supervisor approval reminder

### **Escalations on pending approval with Notification**

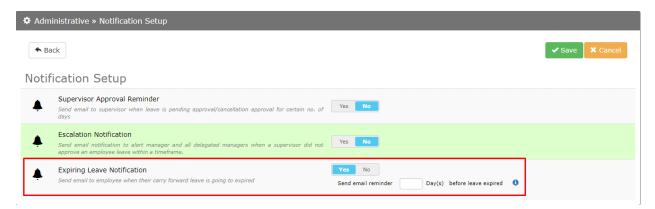
Escalation Notification – setting to send email notification to alert higher-level manager / all delegated managers when supervisor have not approve employee's leave request within a timeframe



- Insert timeframe for escalation notification in the text box after feature is being turned **ON** in the escalation notification
- Optional Insert HR email address to notify HR if escalation email is missing

### **Notification on Expiring Carried Forward Leave**

Expiring Leave Notification – Setting to send email to notify employee when <u>leave carried forward</u> is expiring.



Insert number of days to send email to notify employee before the expires of their carried forward leave, user need to ensure that the feature is being turned ON in expiring leave notification.

# MASS CANCELLATION / WITHDRAWAL

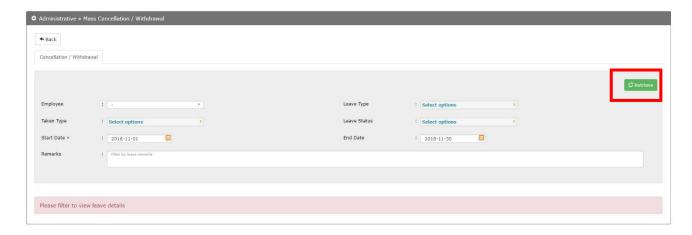
#### Mass Cancellation / Withdrawal

Function to mass cancel or withdraw employee's leave at the same time. There will be options **to send or not to send notification** email to respective participant and whether cancellation **approval is required or not** for approved leave.

1. Go to Administrative > Mass Cancellation / Withdrawal



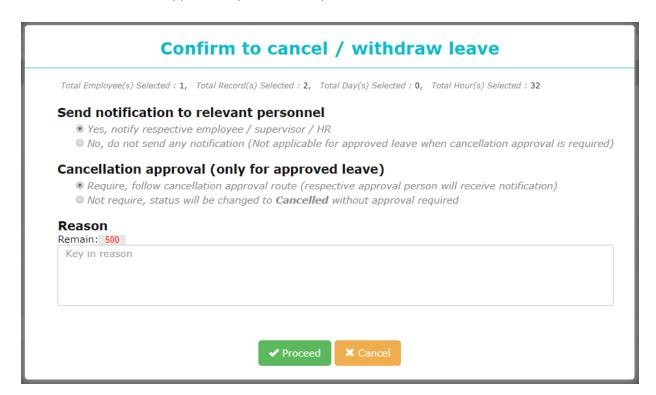
2. Apply necessary filter and click on Date are set as current month by default setting.



3. All leave records will be displayed at the bottom after filters applied. Tick at least one leave record to proceed to cancel or withdraw and click on \*\*cancellation / Withdrawal



- 4. Two options to process leave cancelation and withdrawal
  - I. Send notification to relevant personnel
    - Yes <u>Email will be sent</u> to the relevant target (Employee / Supervisor / HR), depends on the policy setting
    - b. No <u>Email will **NOT** be sent</u> to any participant. However, this option is not valid for **Approved** leave when require cancellation approval option is chosen.
  - II. Cancellation approval (only for approved leave)
    - a. Required- leave status will follow cancellation approval route (first level only) and send approval email to the respective approval person
    - b. Not required **Approved** leave status will be changed to **Cancelled**, without approval required from supervisor nor HR.

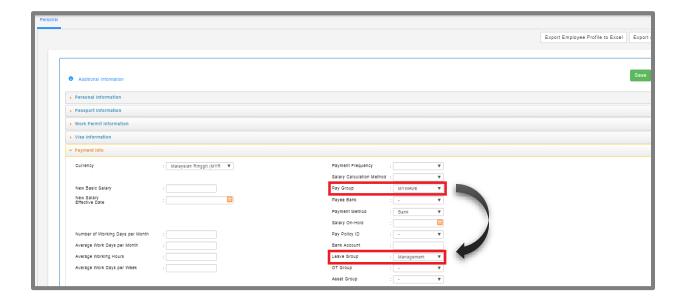


# **LEAVE GROUP IN EMPLOYEE PROFILE**

### **Assign Leave Group for New Hire**

In Employee profile, field of Leave Group is shown in the tab of Payment Info. When Pay Group is selected, it will auto-select Leave Group following the default pay group.

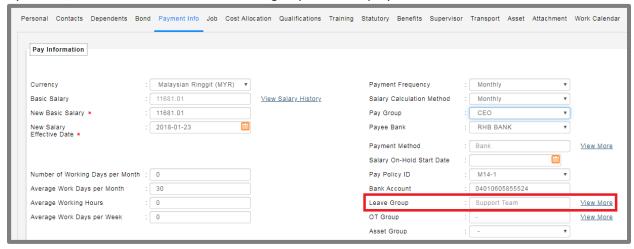
If employee's leave group <u>is different from</u> the default leave group following the pay group, change the Leave Group and "Save".



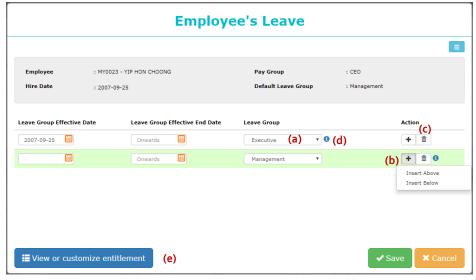
### View / update Employee's Leave Group

Employee Profile > Payment Info tab > Leave Group

By default, it shows the current active leave group of the employee.



Click on the <u>View More</u> to view all historical data of assigned leave group or user can update employee's leave group.



- a. To edit make changes on the records then click "Save"
- b. **To add new effective date**: click and select "Insert Above" to add effective date before the record or "Insert Below" to add effective date after. Update the effective date and leave group, click "Save".
- c. **To remove** click then click "Save"
- d. Mouse over the <sup>1</sup> to view value before changes made
- e. Click Sieview or customize entitlement to view entitled leave type of the employee

Before saving employee's Pay Group, system will detect whether default Leave Group under the new Pay Group is the same one with employee's current leave group.

If it is different, system will prompt option for user to update employee's leave group.



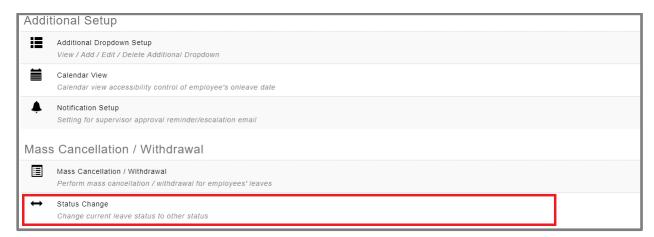
# **STATUS CHANGE**

In order to change the status of the leave, please make sure the admin has the access as below:

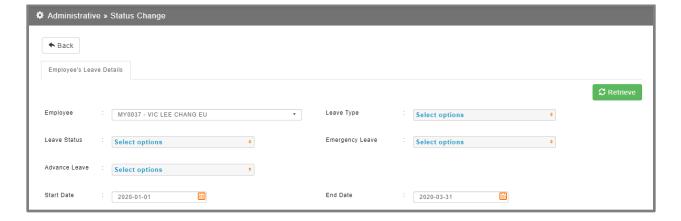


After that please proceed to leave module. Then Status Change will be available under Administrative.





1. Select the filter and click Retrieve to retrieve the data based on the filters.



2. Change the Emergency Leave and click Save



3. After saved, system will prompt whether to send email back to respective employee / supervisor / HR.

