

# User Guide

## API Loading v2.0

Leave



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# BULK IMPORT

Navigate to API > API Loading via side bar

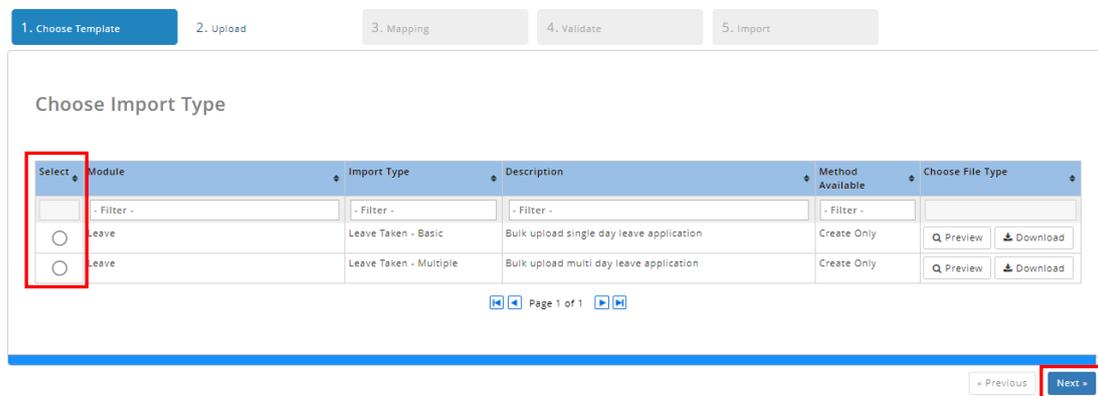
## 1.1. Select Import Type

1. Under the toolbar Menu, look for **Bulk Import** Tab.



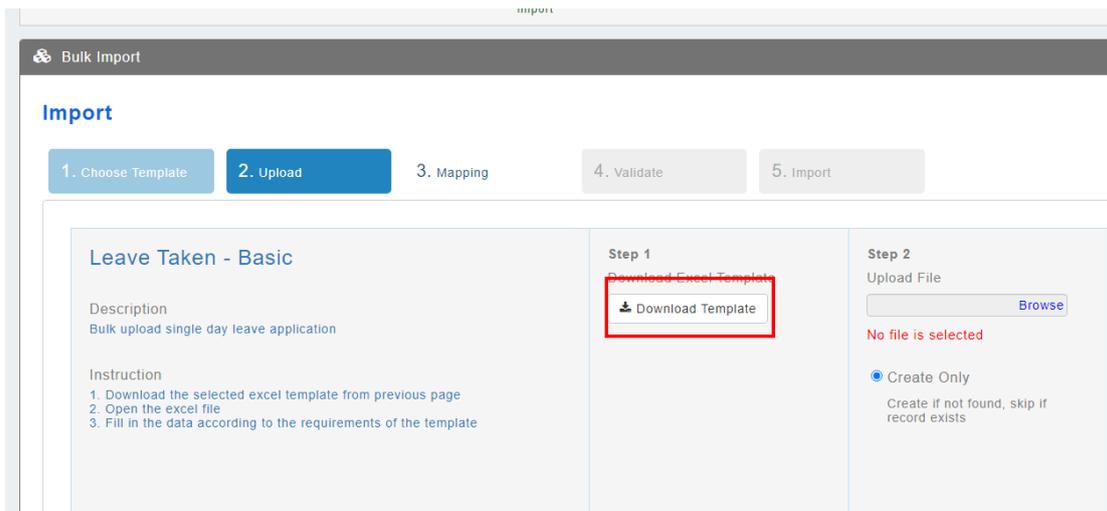
2. Select a suitable import type, then click **Next**

### Import

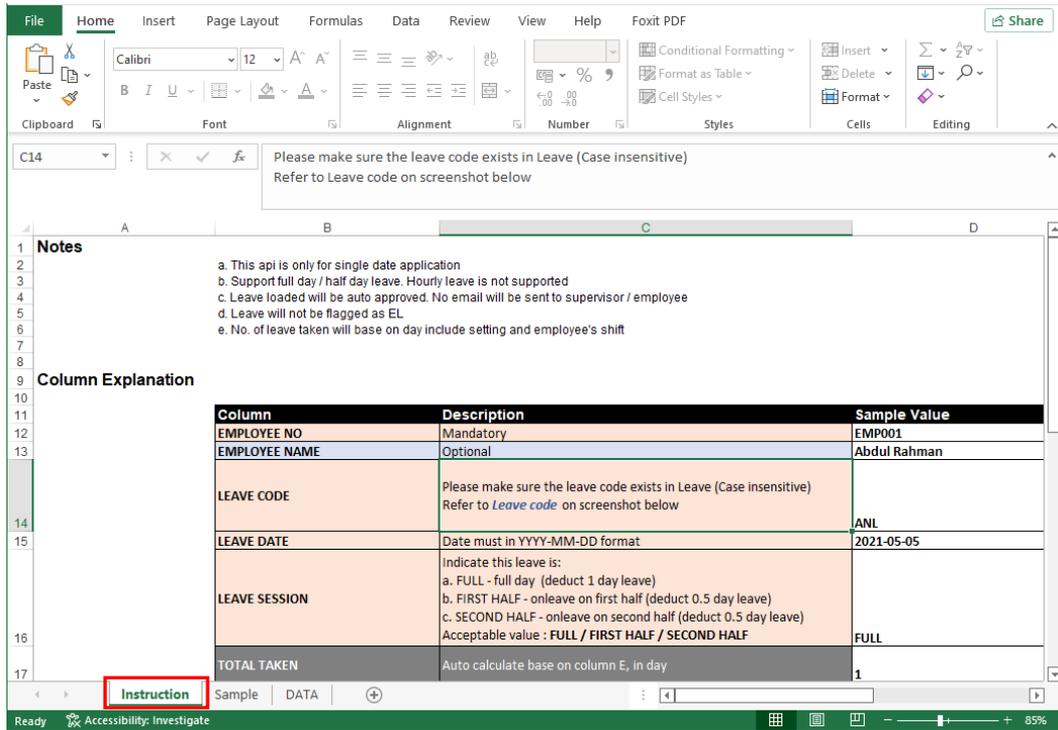


## 1.2 Upload Excel File

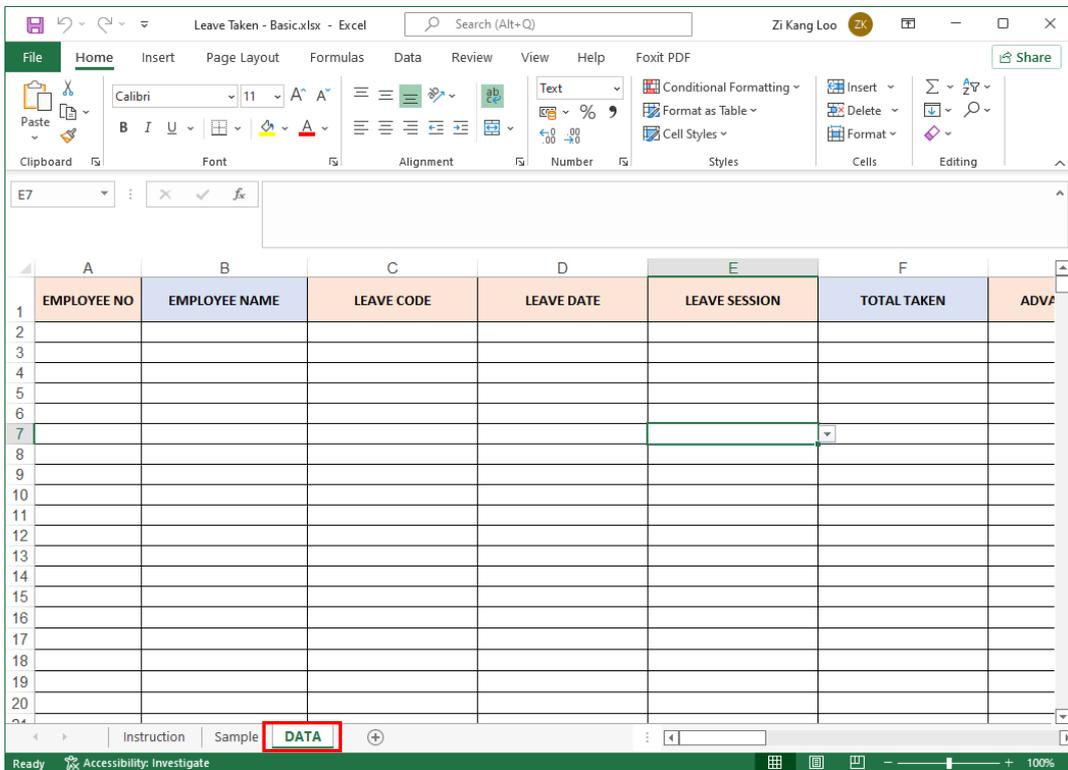
1. Download the Excel file template provided.



- Open the downloaded Excel Template and read the **Instruction** Tab for more information on what data is required for the selected import.



- Insert the data to be imported in the **DATA** tab and save the excel file.



4. Upload the saved excel file by clicking **Browse** then selecting the desired file.

### Import

1. Choose Template   2. Upload   3. Mapping   4. Validate   5. Import

#### Leave Taken - Basic

Description  
Bulk upload single day leave application

Instruction  
1. Download the selected excel template from previous page  
2. Open the excel file  
3. Fill in the data according to the requirements of the template

Step 1  
Download Excel Template

[Download Template](#)

Step 2  
Upload File

[Browse](#)

No file is selected

Create Only  
Create if not found, skip if record exists

5. Once the upload is completed, select the import method (if applicable) then click **Next**.

Step 1  
Download Excel Template

[Download Template](#)

Step 2  
Upload File

Leave Taken Multiple.xlsx [Browse](#)

[Done!](#)

Success

Update & Create  
Update if found, create if not found

Update Only  
Update if found

Create Only  
Create if not found, skip if record exists

« Previous   [Next »](#)

### 1.3 Column and Data Mapping

**Figure 1.1**

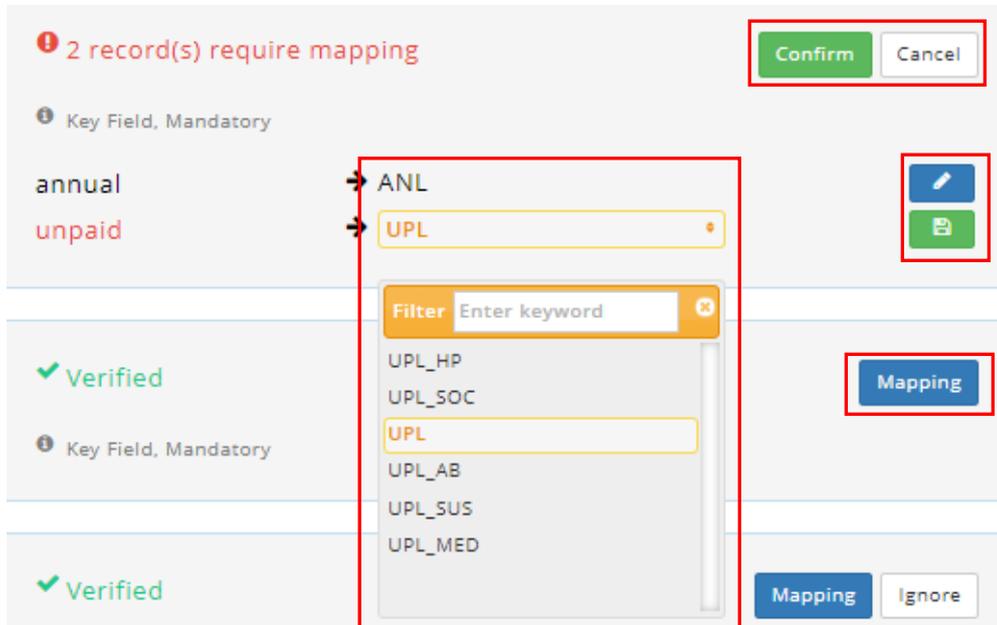
Refer to Figure 1.1

- a. Count of Total columns that is needed by the selected Import type
- b. Count of Columns that is successfully mapped
- c. Count of Columns that has errors [Appeared as Red status message]
- d. Count of Columns that have not been mapped
- e. Count of Columns that are ignored
- f. Load previous configuration of last mapping (Only possible when previous mapping of the same import type have been done)
- g. Data field required by the Import Type
- h. Uploaded Excel File column header to be mapped against
- i. Status message of mapping
- j. Indicator for fields that must be mapped
- k. Ignore button to ignore this data field (It will appear as blank when importing)
- l. Mapping button to change the data in excel file to be mapped

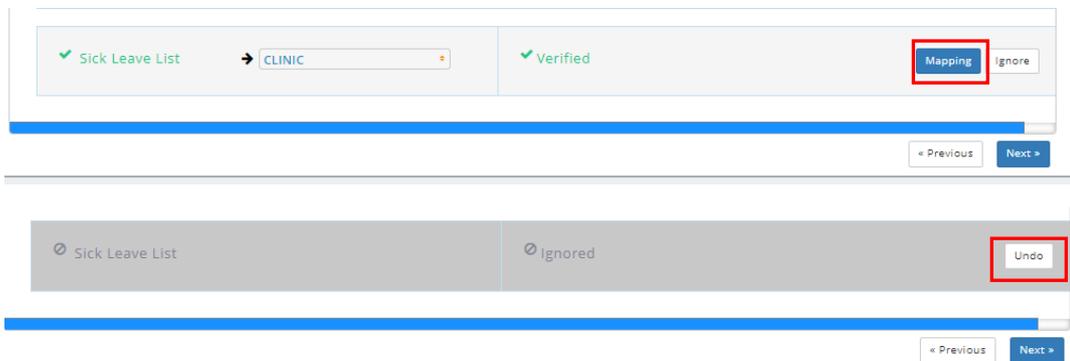
Follow the steps below to perform column and data mapping

1. Select the desired column to be mapped by clicking on the drop down list. User can filter the columns by entering value in the search bar.

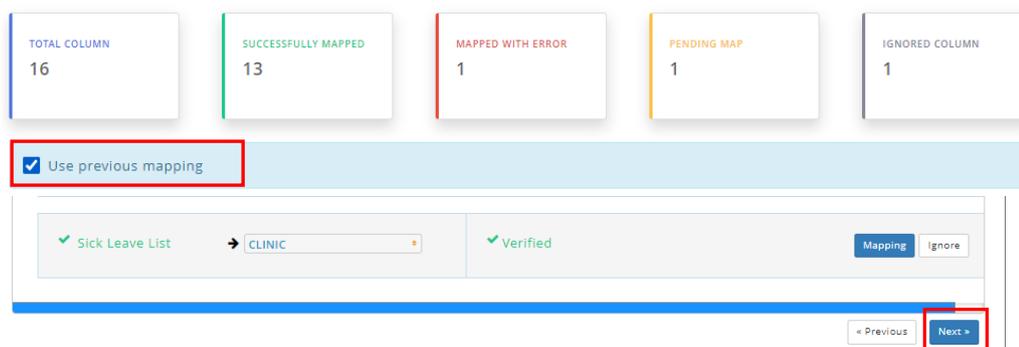
2. Select the desired data field to be mapped by clicking on the **Mapping** button then choosing a value from the drop down list. User can filter the columns by entering value in the search bar. Click on the **Save** button to save the data field mapping or click on the **Edit** button to edit previously saved data mappings. Then click on the **Confirm** button to confirm mapping changes or **Cancel** to cancel changes.



3. Click on the Ignore button to ignore the respective column or Undo to enable column to be mapped.



4. If previous mapping of the same import type has been done before, user can check the **Use Previous Mapping** option to follow previous mapping settings. Otherwise, click on the **Next** button to proceed.



## 1.4 Validation Result

1. Once validation is complete, a table of records will be shown. The **Status** column shows the status of the record and whether it was successfully validated or an error has occurred. The **Reason** column shows the reason why validation failed (if any).

1. Choose Template 2. Upload 3. Mapping 4. Validate 5. Import

TOTAL 2

READY 1

WARNING 0

ERROR 1

Show 10 entries

No.	Status	Reason	Employee No	Employee Name	Start Date	End Date	Leave Session	Start Time	End Time	Emergency Leave	Leave 1 - Leave Code
1	Ready	-			2022-08-01	2022-08-01	FULL	-	-	NO	ANL
2	Error	Duplicated Data			2022-08-01	2022-08-01	FULL	-	-	NO	ANL

Showing 1 to 2 of 2 entries

Export

Previous 1 Next

« Previous Next »

2. User can export the validation result to an excel file by clicking on **Export** button. Otherwise, click on **Next** to begin importing data

1. Choose Template 2. Upload 3. Mapping 4. Validate 5. Import

TOTAL 2

READY 1

WARNING 0

ERROR 1

Show 10 entries

No.	Status	Reason	Employee No	Employee Name	Start Date	End Date	Leave Session	Start Time	End Time	Emergency Leave	Leave 1 - Leave Code
1	Ready	-			2022-08-01	2022-08-01	FULL	-	-	NO	ANL
2	Error	Duplicated Data			2022-08-01	2022-08-01	FULL	-	-	NO	ANL

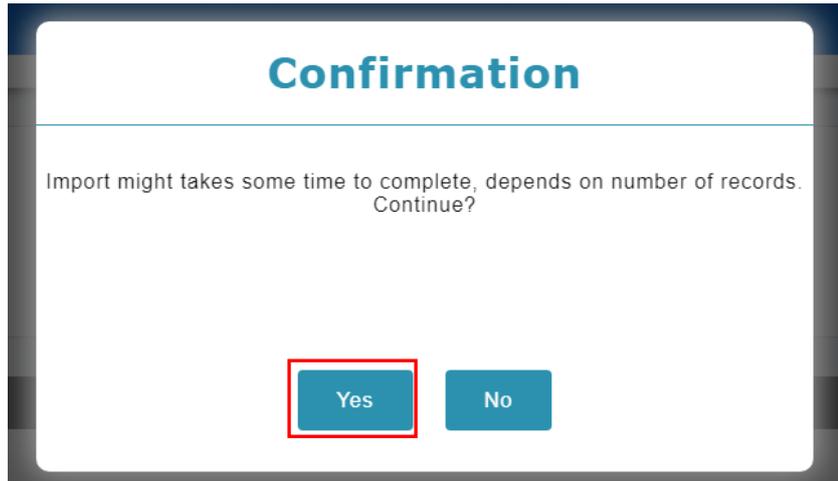
Showing 1 to 2 of 2 entries

Export

Previous 1 Next

« Previous Next »

3. Click Yes on the pop up box to confirm import process



**\*NOTE: API Loading may bypass certain settings in Leave Setup. Please refer to [Appendix A: Affected Leave Setup](#) to learn more about which settings will be affected\***

### 1.5 Import Result

1. Once the import process is done, the results will be shown in a table. Import information will be displayed in the header above. Check the status column for any errors. User can export the import result by clicking on **Export**. Otherwise, click on **Finish** to complete the import process

LOG ID: 177 | IMPORT TYPE: Leave Taken - Multiple | UPLOADED BY: Administrator | 2022-08-02 14:37

TOTAL: 2 | INSERT: 1 | UPDATE: 0 | ERROR: 1

Show 10 entries

No.	Status	Reason	Employee No.	Employee Name	Start Date	End Date	Leave Session	Start Time	End Time	Emergency Leave	Leave 1 - Leave Code
1	Success	Leave Applied: Annual Leave			2022-08-01	2022-08-01	FULL	-	-	NO	ANL
2	Error	Duplicated Data			2022-08-01	2022-08-01	FULL	-	-	NO	ANL

Showing 1 to 2 of 2 entries

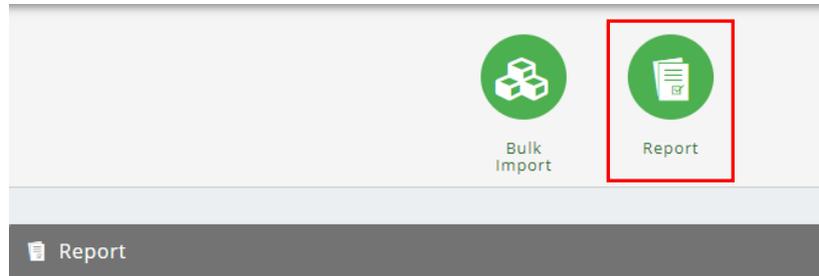
Previous 1 Next

Previous Finish

# REPORT

## 2.1 View Import Logs

1. Under the toolbar Menu, look for **Report** Tab, then click on **Import Log**.



### Report



2. The report will be displayed in a new window

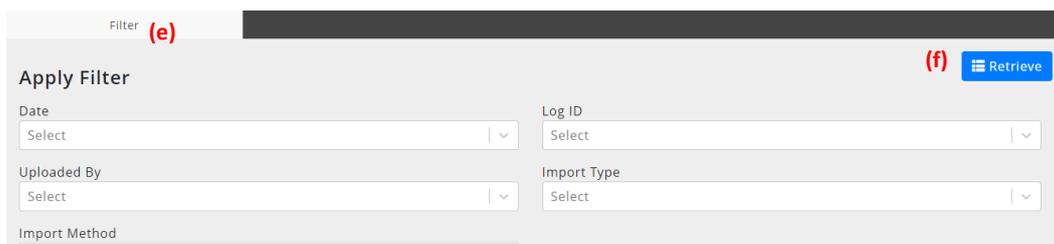
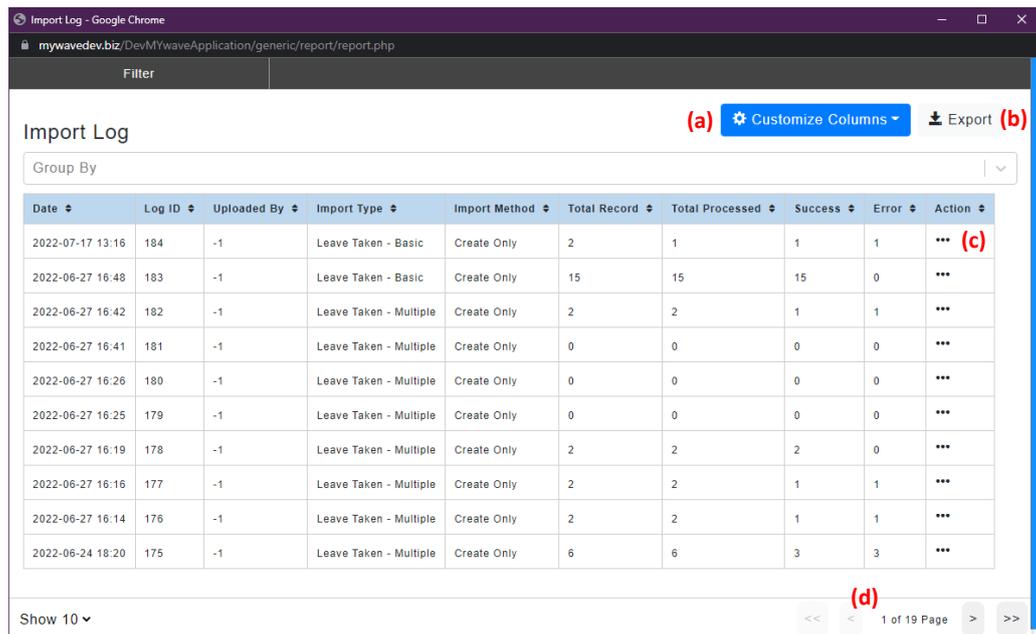


Figure 2.1

Refer to Figure 2.1

- a. Click to show/hide columns
- b. Click to download report to excel
- c. Click to expand record
- d. Paging and no. of employee per page
- e. Apply Filter to for user preference report format
- f. Click to filter the data

The screenshot displays a web application interface for leave management. At the top, it shows 'LOG ID 177' and 'IMPORT TYPE Leave Taken - Multiple' with an 'Update & Create' button. The 'UPLOADED BY' is 'Administrator' on '2022-08-02 14:37'. Below this are four summary cards: 'TOTAL 2', 'INSERT 1', 'UPDATE 0', and 'ERROR 1'. A 'Show 10 entries' dropdown is present. The main table has columns: No., Status, Reason, Employee No., Employee Name, Start Date, End Date, Leave Session, Start Time, End Time, Emergency Leave, and Leave 1 - Leave Code. The first row shows a successful leave application for employee 'YE OH PAIK WEI' from '2022-08-01' to '2022-08-01'. An 'Export' button is on the right, and a 'Close' button is at the bottom right.

No.	Status	Reason	Employee No.	Employee Name	Start Date	End Date	Leave Session	Start Time	End Time	Emergency Leave	Leave 1 - Leave Code
1	Success	Leave Applied: Annual	000006	YE OH PAIK WEI	2022-08-01	2022-08-01	FULL	-	-	NO	ANL

**Figure 2.2**

Refer to Figure 2.2

- a. Import information is shown here
- b. Click to download report to excel
- c. Click to close pop up box

## APPENDIX

### 3.1 Appendix A: Affected Leave Settings

#### **Earn**

If Advance leave is set to **Follow** in the Excel data sheet, all advance leave settings under **Earn** tab will be **applied**.

Advance Leave

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Allow Advance Leave \* :  Yes  No ⓘ

Advance Leave Limit \* :  No Limit  
 Full Leave Period Entitlement  
 Limit to  Day

Restrict Limit at Period Entitlement \* :  Yes  No

Advance Leave Duration Control \* :

#### **Application**

General Entitlement Earn **Application** Additional

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ⓘ Data has been changed. Mouse over icon to view the value before changed.

Supervisor Approval \* (a) :  Supervisor approval not required  
 Direct supervisor approval  
 Levelling approval  
 Limit approval  
 Conditional approval base on no. of leave applied

HR Approval/ Notification Required \* (b) :  Not Required  
 Required  
 Required when leave applied more than/equal to  Day(s)

Require Signature Upon Approval \* ⓘ (c) :

Require Signature Upon Submission \* ⓘ (d) :

Who Can Apply Leave \* (e) :  Admin, Supervisor and Employee  
 Admin and Supervisor  
 Admin Only

Who Can Withdraw/ Cancel Leave \* (f) :  Admin, Supervisor and Employee  
 Admin and Supervisor  
 Admin Only

Emergency Leave Tracking \* (g) :  Yes  No ⓘ

**Figure A1**

Refer to Figure A1

- Supervisor Approval settings will be **bypassed**
- HR Approval/Notification settings will be **bypassed**
- Signature Upon Approval settings will be **bypassed**
- Signature Upon Submission settings will be **bypassed**
- Who Can Apply Leave settings will be **bypassed**
- Who Can Withdraw/Cancel Leave settings will be **bypassed**
- Emergency Leave Tracking settings will be **bypassed**

## Application (cont.)

### Application Consumption Control

Include Non Working Day in Leave Duration **(a)** :  Workday Only  
 Include :  Off Day  Rest Day  Public Holiday

Application Method on Complete Working Day **(b)** :  Full Day  Half Day  Hourly

Application Method on Half Working Day **(c)** :  Full Day  Half Day  Hourly

Minimum Days Per Application **(d)** :  Day(s)  No Minimum

Maximum Days Per Application **(e)** :  Day(s)  No Maximum

Maximum Application Per Period Cycle **(f)** :   No Limit

**Figure A2**

### Refer to Figure A2

- Non Working Day in Leave Duration settings will be **applied**
- Application Method on Complete Working Day settings will be **bypassed**
- Application Method on Half Working Day settings will be **bypassed**
- Minimum Days Per Application settings will be **bypassed**
- Maximum Days Per Application settings will be **bypassed**
- Maximum Application Per Period Cycle settings will be **bypassed**

### Leave Date Control

Allow Leave Application Starting From **(a)** :  No Control  
 Upon Confirmation  
 0 month(s) after Hire Date, No Confirmation Required

Restrict Leave Application on Resignation **(b)** :  No Restriction  
 Not allow to apply leave once Resignation Date is updated

Block Future Leave Application **(c)** :

Back Dated Application **(d)** :  No Restriction  
 Within range in Month(s) Before Current Date

Past Leave Cancellation **(e)** :  No Restriction  
 Within range in Month(s) Before Current Date

Gap For Next Leave Transaction **(f)** :  No Restriction  
 With gap restriction Months between on leave date must more than 0

### Additional Information

Attachment Required **(g)** :  Optional  Mandatory

Remarks Required **(h)** :  Optional  Required for :  Application  Cancellation  Rejection

**Figure A3**

Refer to Figure A3

- a. Leave Application Starting From settings will be **bypassed**
- b. Leave Application on Resignation settings will be **bypassed**
- c. Future Leave Application settings will be **bypassed**
- d. Back Dated Application settings will be **bypassed**
- e. Past Leave Cancellation settings will be **bypassed**
- f. Gap For Next Leave Transaction settings will be **bypassed**
- g. Attachment settings will be **bypassed**
- h. Remarks settings will be **bypassed**

**Additional**

If additional information setting is **enabled** and set to **Mandatory**, it will be **applied** during API Loading validation.

General Entitlement Earn Application **Additional**

Additional Information

Additional Dropdown :

Clinic  Optional  Mandatory

Reason  Optional  Mandatory

**Combine Limit/Priority List**

If the selected leave type is set up under a combine limit/priority list leave, **limit per period** and **period pattern** settings will be **applied**.

Combine Limit / Priority List

1998-01-01 Onwards

No.	Leave Type
1	Medical Leave
2	Hospitalisation

Priority Control : No  
Combine Limit : Limit to 60 Day(s), display unit in Day

[Update](#)