

Leave Configuration Guide





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Introduction

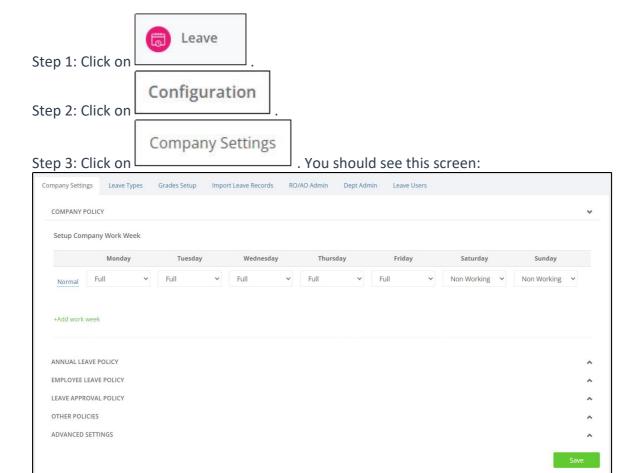
The Leave module is designed to ease the leave management of your company. This setup guide will show you how to setup the Leave module while a separate guide will show you how to administer to the leave as an administrator

Configuration

COMPANY POLICY

Setup Company Work Week

You will need to define the working weeks of your company. This is important as this will be used by the system to calculate the proration of leaves, as well as determine when the staff can take leave.



Step 4: You can configure the working week/s according to your company's requirements.

Step 5: If you have more than 1 working week, you can click on and set accordingly.

You can also change the name of the work week by clicking the name and click on the blue check icon to save it





You can define up to 10 different working weeks.

ANNUAL LEAVE POLICY

Annual Leave Policy Setup

Leave Accrual – This is where you can indicate how the staff leaves are being accrued. There are 5 options - Daily, Monthly, Calendar Year, Financial Year or Employee Anniversary.



NOTE: If either Daily or Monthly is selected, the next section - Policy for New Employees will not be displayed.

Leave Calculation Based on – This is to indicate when any applicable increments will be applied to the yearly entitlement, whether it's based on Calendar Years (Beginning of the Year) or Years of Service (Join Date).



Policy for New Employees

When accrual policy is set to full year entitlement (Calendar Year, Financial Year, Employee Anniversary), this is how the Leave system will handle the proration of the leave balance of new hires.



NOTE: Same proration setting will be followed for resigned staff.

Policy for new emplo	oyees		
Annual leave entitleme	nt for new employees	will be	
Prorated ~	Monthly ~	Half month entitlement if join date is after 15th of t	~

Annual Leave Setting

Put a tick if you allow your staff to take Annual Leave for more than what their current leave balance at the time of the leave submission.

Allow employee to apply Annual leave more than their current balance.

Put a tick on this setting if you require your staff to submit their leave application day/s ahead of time. Indicate the minimum number of day/s they need to submit prior to the leave day/s.

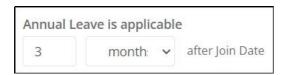


If you allow attachment or would require it to be mandatory, you can tick this option:



Annual Leave is applicable

Set the minimum period of employment before staff can take Annual leave.



Annual Leave Notifications

Put a tick if you wish to receive an email notification for every annual leave approved.



Annual Leave Notifications

✓ Notify leave administrator when Annual leave is approved.

EMPLOYEE LEAVE POLICY

Staff policy allows you to set staff-related policies such as the probationary period and other leave-related policies. This will provide you with a detailed explanation of each of the functions in this section. Employee Leave Settings

Put a tick on whichever option is applicable, following your policies.

EMPLOYEE LEAVE POLICY		
Employee Leave Settings		
Allow employee to apply other leave types more than the	neir current balance.	
☐ Allow employee to apply different leave types on the sa	me day.	
Allow employee to edit "days applied" field when applyi	ng leave.	
☐ Treat leave applied on a half working day as a full-day's	leave.	

- 1. Whether the staff can take Other Leave types, if they apply more than what their current leave balance.
- 2. Whether the staff can apply two different leave types(overlap) on the same day. If set to No, staff will still be able to take half-day of different leaves as long as the timing of the leave does not coincide.
- 3. Whether the staff can change the days applied field.
- 4. Whether the system will deduct one day if the staff takes a leave on a half-day working day (based on assigned Work Week).

Leave Cancellation

Set the leave cancellation policy for the staff

Leave Cancellation Allow leave cancellations. Allow leave cancellations submitted before leave date applied. Disallow leave cancellations.



- 1. All leave cancellations are allowed. This option would allow the staff to cancel their leaves regardless of the status. If leave has already been approved, cancellation will go through another approval by the AO.
- 2. Leave cancellation is allowed ONLY if cancellation is done prior to the leave date. e.g. I have filed a leave for Friday, I can cancel the leave until Thursday, 11:59 pm.
- 3. Users are NOT allowed to cancel the leave. The staff will not have an option to cancel the leave at all. If they wish to, they will need to go through the Leave Administrator or their RO/AO (if given the rights) to cancel the leave.

LEAVE APPROVAL POLICY

In Leave, we can define how employees' leaves are to be approved by the appropriate approving officer/s. This section is where you can set your company's approval flow.

Indicate whether you require a Recommending Officer (if you follow a 2-level approval). When applicable, a Recommending Officer is the first appover, the one that recommends the leave, and not the final approving officer.

Recommending Officers (RO).

Require a Recommending Officer in the leave approval flow.

Assigning Recommending Officers (RO) and the Approving Officers (AO)

Select one option on how the RO/AO are to be assigned in the company.

Assigning Recommending Officers (RO) and the Approving Officers (AO).

- O User can select anyone as RO/AO.
- O Pre-defined AO, only users selected by eLeave Admin or eLeave Admin Assistants can be selected as AO and anyone can be selected as RO.
- O Pre-defined RO/AO, only users selected by eLeave Admin or eLeave Admin Assistants can be selected as RO/AO.
- RO/AO for each user must be selected by eLeave Admin.
- 1. This will allow the users to select their own Recommending and Approving officers from anyone in the company.
- 2. This will allow the users to select their own Recommending officer, anyone from the company. The Approving Officers however, are pre-defined. The Leave Admin will need to select the AOs beforehand.
- 3. This is a pre-defined RO/AO option, Leave Admin will need to select whoever will need to be ROs and/or AOs.
- 4. This will allow the Leave Admin to assign specific Recommending and Approving Officers on an employee level.



Recommending Officers (RO) and Approving Officers (AO) Settings

Put a tick beside each option that you would like to enable for your system

Recommending Officers (RO) and Approving Officers (AO) Settings
☐ Allow RO/AO to view employee leave details.
☐ Allow RO/AO to apply block leave on behalf of the employee.
☐ Allow RO/AO to cancel leave for employee.
☐ Allow RO/AO to approve leave applications through email.

- 1. Whether to allow the AO/RO to view staff leave details
- 2. Whether the AO/RO can take leave on behalf of the staff. Note that when a block leave is invoked by the AO/RO, the approval progress is no longer required
 - 3. Whether the AO/RO can cancel leave on behalf of staff
- 4. If you allow the AO/RO to approve the leave application through email instead of having to login to their Justlogin accounts

OTHER POLICIES

Leave Calendars

Other Policies allows administrators to decide on policies such as whether the staff can see each other's calendars, the use of external calendar as well as the rounding policies.

Put a tick whether you allow the staff to see the leave application details of their colleagues. Normally, we will not set this to Yes as they will see the leave entitlement of others

Leave Calendars		
Allow employees to view leave details on the leave calendar.		

The leave system can pipe the approved leave to either Google Calendar or Outlook calendar if you wish the system to do so. To do that, enter the email address of the calendar as shown below

✓	Sync approved leaves to external calendar.				
	Email address of external calendar:	calendar@justlogin.com			

Leave Calendar Sharing Policy

Select the calendar sharing options

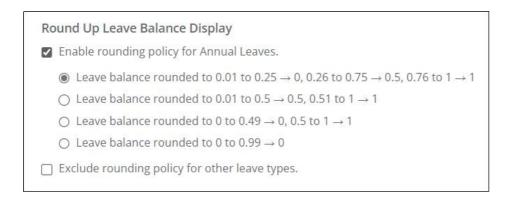


Leave Calendar Sharing Policy All leave calendars are allowed to be shared. Only the department leave calendar will be shared. No, all leave calendars are not allowed to be shared.

The first option is that everyone in the company can see their colleagues and their own calendars. The second calendar is limiting to only people within the same department can see each other calendars. The third option limits the user to see their own calendars only.

Round Up Leave Balance Display

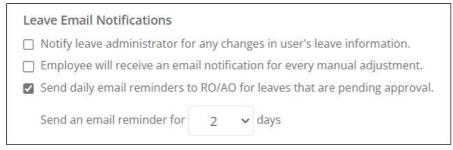
Select the rounding policy for your company. The rounding policy is to help round up the leave balances which makes it easier to see as opposed to the leave in long decimal formats.



If ticked, the system will not apply the rounding policy to other leave types such as Marriage/Maternity/Compassionate

Leave Email Notifications

Put a tick beside each option that you would like to enable for your system



- 1. Whether the Leave Administrator shall receive an email if the leave information of the user such as Entitlement or Balances has changed
- 2. If you want the employees to receive an email notification every time there is an adjustment made for them manually
- 3. Set the number of days the AO/RO will receive reminders of pending leave approvals that they have yet to approve. Note that the system will 1 reminder per day per applicant



ADVANCED SETTINGS

This section will show new features on the Leave Module that you can enable. To know more about Advanced settings, please go through the details below

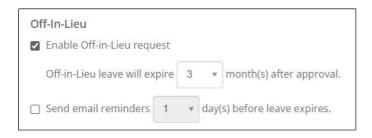
Hourly Leave

Put a tick if you allow employees to apply for leave in hours – this will allow your staff to apply for a leave based on hours, instead of days only. If this is enabled, please indicate the number of hours that is equivalent to one working day



Off-In-Lieu

Enable Off-in-Lieu Request – this will allow the staff to request for any OT rendered to be converted into a leave type. This works independently from the Attendance module. You can indicate an auto-expiry for such requests and a notification whenever the leave expires to be sent



Adjustment

Enable Adjustment with Expiry – this function will allow the administrator to credit leaves with expiry to the staff via adjustment.





Overtime Leave

Overtime leave will Expire ____ month(s) after approval – this option is integrated with the Attendance module. If enabled and staff requests for their OT to be converted into a leave type on the Attendance module, the Leave system will automatically set an expiry date for such requests



Employee on Leave Email Settings

Put a tick on this option if you want to send daily reminder who are the employees on leave



AND NOTE: For any changes to the configuration, please do not forget to click

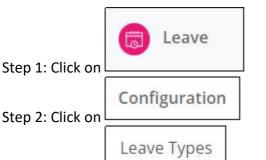


Leave Types

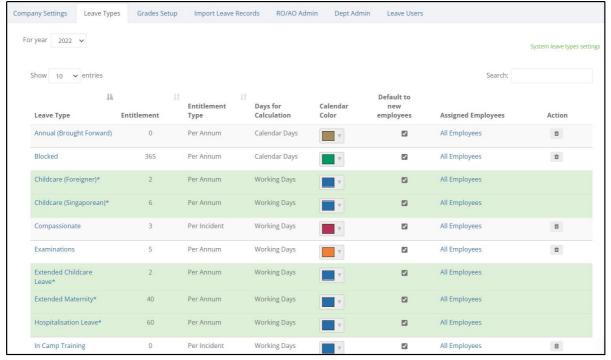
The Leave Module allows you to create and set up your own leave types based on your company's requirements.

The steps to set up the leave type are:





Step 3: Click on tab at the top. You should see a page like below.



System Leave Types Settings

Step 4: Click on System leave types settings link at the top right of the page.

NOTE: This is mandatory for companies that are operating within Singapore. Not needed for companies that are not operating in Singapore as the settings are leave types that companies in Singapore must comply to

Step 5: The following dialogue box will appear. Check on all the options



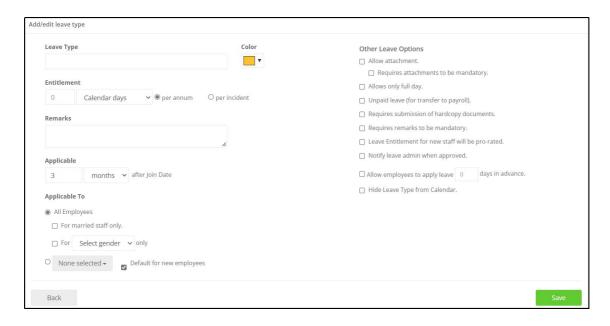


For Sick Leave and Hospitalisation Leave see more guide here While Child Care, Paternity, and Extended Maternity need to update Child Details page.

Step 6: Click on the button to save the configuration.

Creating New Leave Type

Step 7: To add a new leave type, click on the page. A window will appear:



Step 8: Enter the leave type name





Step 9: Assign a color code for this leave type. The color assigned will be the color that appears on the leave calendar



Step 10: Set the Leave Entitlement (number of days), days of calculation (calendar days or working days) as well as the type of mode (per annum or per incident)



- 1. Per annum staff will have the entitlement days for the whole year
- 2. Per incident staff will be able to use the entitlement days for every leave application

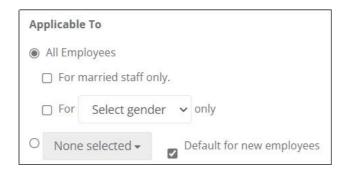
Step 11: (Optional) Enter a description or remarks at the Remark field



Step 12: The probationary period indicated in this field is based on the Staff Policy setup (pg.3) on probation for other leave types:

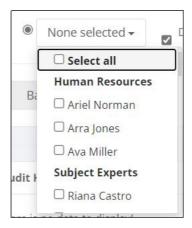


Step 13: You can filter the leave type based on gender and marital status in this field

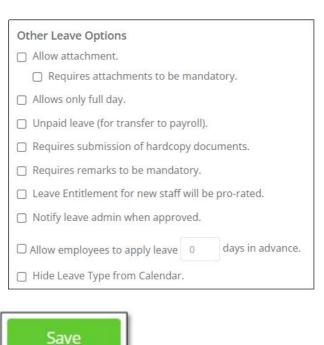




You may also assign specific employees to it too:



Step 14: (Optional)You can select the relevant options below



Step 15: Click on the

button to save

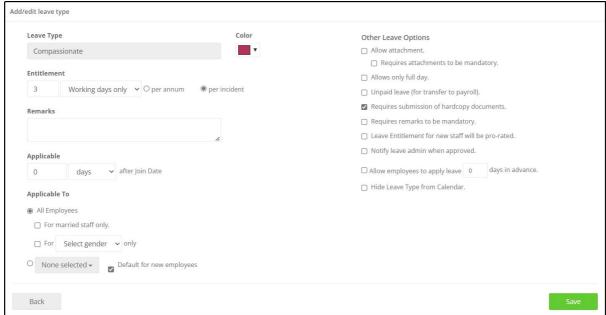
To Configure the other Leave Types on the Leave Types page:

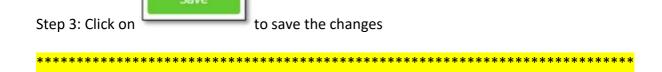
Step 1: Click on the leave type you would like to configure:





Step 2: You will see the same options as when creating a new leave type



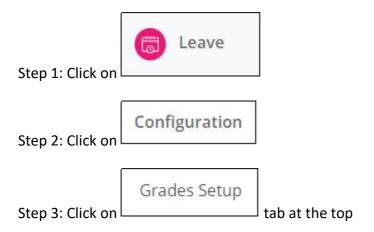


Grades Setup

Leave grades need to be configured as this is where the increments on the leave credits can be indicated. This is used by the system to automatically calculate the entitlements of the staff based on years of service or calendar years.



The steps to configure the Leave Grades are as follows:





To create a Leave Grade, click on

Step 4: You will see the next page where you will need to complete the fields below:



Step 5: Enter the Leave Grade Name and Entitlement into these fields:





Step 6: Toggle the slider to enable the field where you can indicate the increments



Step 7: Click on and then indicate the increment based on the number of years after hire and the additional leave that staff will be getting

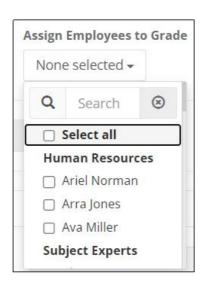


If you would like to delete an increment you have created, you can click on the

+ Add More



Step 8: On this field, you can assign the Grade you have created to the staff





RO/AO Admin

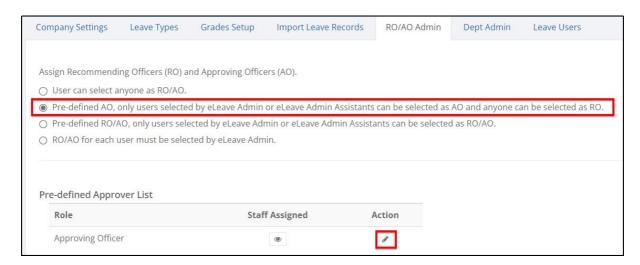
This is where Approving Officers (AO) and/or Recommending Officers (RO) can be assigned to the staff. There are four options to choose from and each option is discussed below:

 User can select anyone as RO/AO - this option will allow each of the staff to choose any leave user in the system to be their approving/recommending officer when applying for a leave



Predefined AO, anybody can be the RO

If you only have one or two Approving Officer/s, choose the option of pre-defining AO. The benefit of doing this is for every new user you add to the leave system, they automatically will see and choose from the <u>list</u> of AO that has been created without having you do anything. ROs can be any leave user in the system

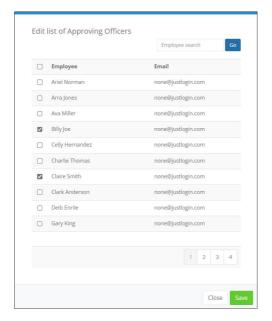


Step 1: Select the Pre-defined AO

Step 2: Click on under the Action column



Step 3: The following window will appear. Select the desired AO by putting a tick beside the name



Save

Step 4: Click on to save the selection.

Predefined AO/RO

If you only have several RO/AO, you may choose the option of pre-defining RO/AO. The benefit of doing this is for every new user you add to the leave system, they automatically will see and chose their Recommending Officer/Approving Officer from the list without having you do anything.

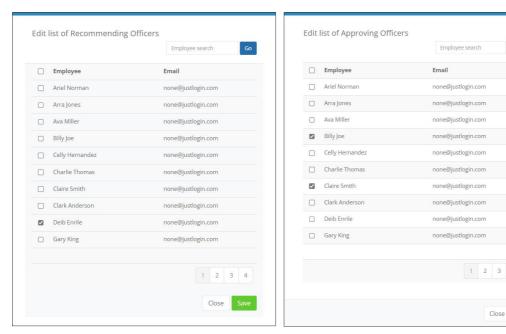
Step 1: Select the third option

Pre-defined RO/AO, only users selected by eLeave Admin or eLeave Admin Assistants can be selected as RO/AO.



Step 2: To add RO or AO, click on the J. Select the desired RO/AO





Step 6: Click on to save.

Step 7: To check who are the RO/AO assigned, you can click on the licon.

AO/RO for each user must be selected by Leave Administrator

If your company is large or has many departments with different AO/RO, this option allows you to specify the AO/RO for individual users.

Step 1: Select the last option

RO/AO for each user must be selected by eLeave Admin.

Step 2: Click on the icon on the right-most column and the fields to assign the AO/RO for the staff will be enabled

Step 3: Click on the button to add the AO and RO for each user.

Step 4: Click on to save the configuration.



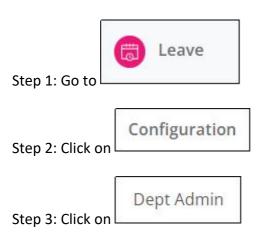
Note: You will have to do steps 2-4 for each user

Department Admin

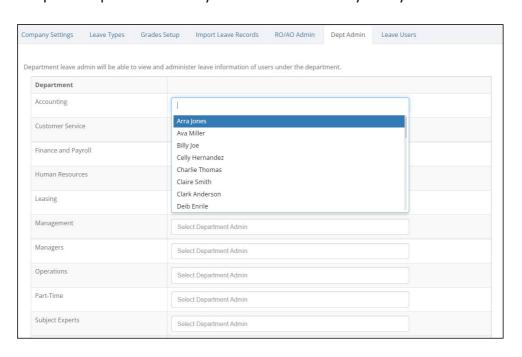
The Dept Admin allows the company to set up different administrators for different departments/groups. Once the staff is assigned as the department administrator, he will be able to administer to the leave for that department. The only thing that the department administrator has no rights to is the configuration tab.

Hence this is ideal for companies that wish to delegate the leave administration to each department while HR maintains control over the configuration.

To assign Dept Admin,



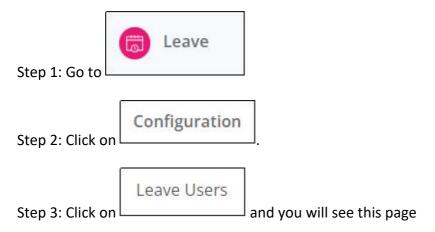
Step 4: Assign the Dept Admin to the respective department by entering the name of the person who will be made the department's leave administrator. You can click on the name from the dropdown options and the system will automatically save your choices.

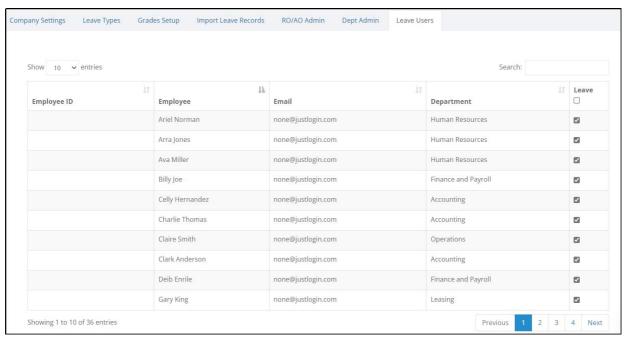




Leave Users

The Leave Users tab allows the leave administrator to check who had been assigned to the leave module.





Those users with the tick in the checkbox are those who have Leave modules enabled for them. Those without would not be able to use the Leave module. Put a tick in the checkbox if you want to assign the staff as a user of the Leave module.

Step 4: Please do not forget to click on the

button to save the changes.

