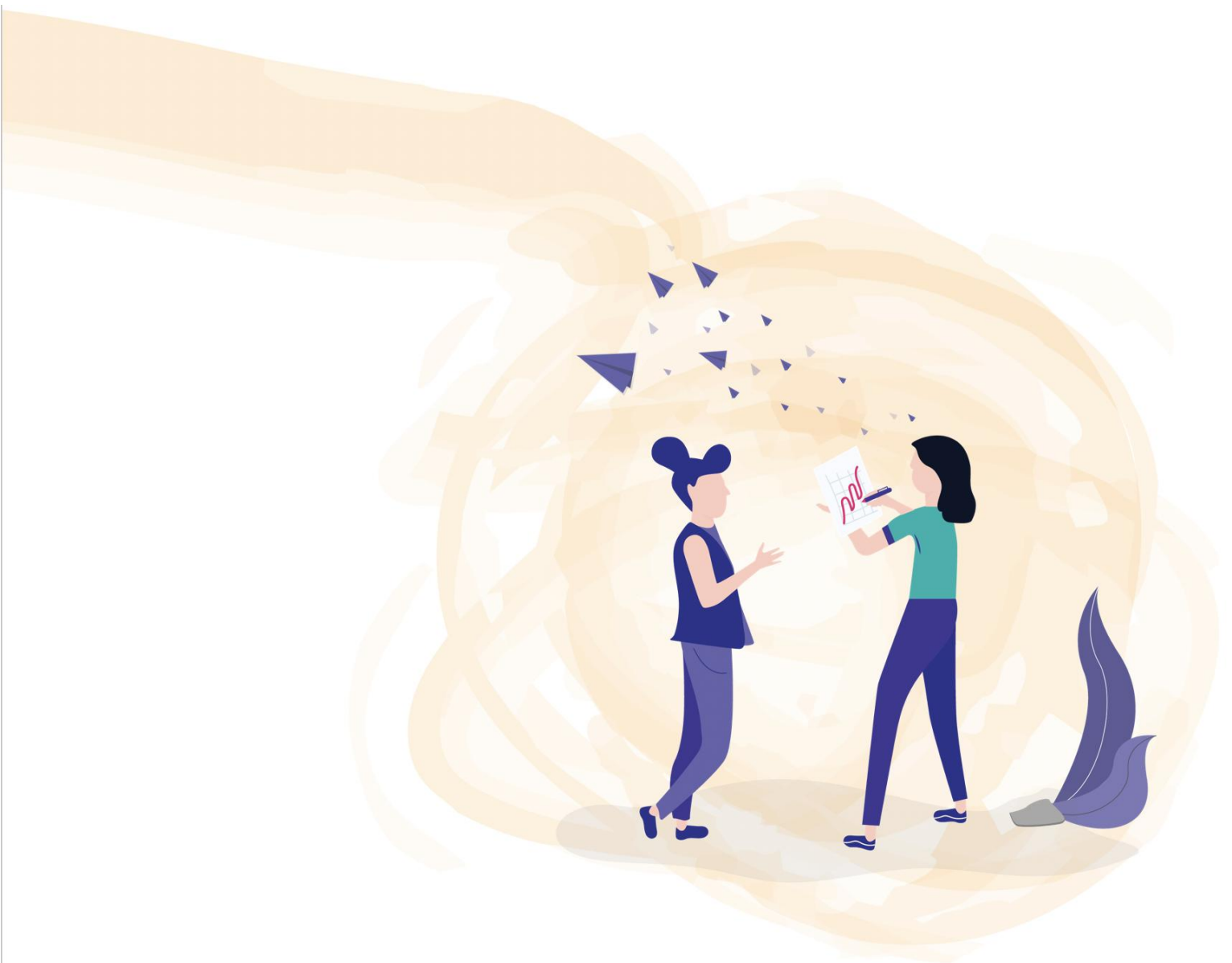




# Leave Administrator Guide





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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.

## Administration

### Block Leave

Leave Administrator can make use of block leave to apply for a leave on behalf of the entire company, department, or individual staff. Block leave will bypass the approval process and will do the required deduction accordingly.

The steps to doing a block leave are:

Step 1: Click on 

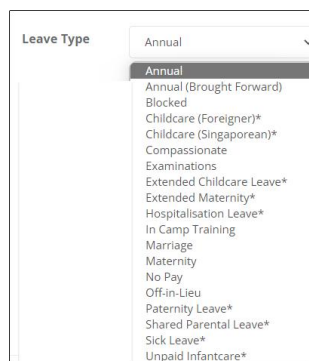
Step 2: Click on 

Step 3: Click on  tab at the top

Step 4: Select whom you wish the leave you wish to apply for at

<b>Block Leave Type</b>	<input type="radio"/>	All employee/depts will be deducted this leave.
	<input type="radio"/>	All employee/depts excluding the selected employee/depts in the following listing box will be deducted this leave.
	<input checked="" type="radio"/>	Only the selected employee/dept in the following listing box will be deducted this leave.

Step 5: Select the leave type for the block leave, if the Leave type is not found here check [this article](#)




The screenshot shows a dropdown menu for 'Leave Type'. The menu is open, displaying a list of leave types. 'Annual' is selected and highlighted. The list includes: Annual, Annual (Brought Forward), Blocked, Childcare (Foreigner)\*, Childcare (Singaporean)\*, Compassionate, Examinations, Extended Childcare Leave\*, Extended Maternity\*, Hospitalisation Leave\*, In Camp Training, Marriage, Maternity, No Pay, Off-in-Lieu, Paternity Leave\*, Shared Parental Leave\*, Sick Leave\*, and Unpaid Infantcare\*.

Step 6: Enter the date range for the block leave



The screenshot shows a date range input field. It has a 'From' label, a date input field containing '02/03/2021', a time selection dropdown set to 'AM', a 'To' label, another date input field containing '02/03/2021', and a time selection dropdown set to 'PM'.

Step 7: (Optional) You can use the CC List field to choose the names of whom you would like to be informed about the block leave that the staff is taking. NOTE: Block leaves are automatically approved and do not go through the normal approval process.

**CC Lists**  
 

Step 8: (Optional) Enter remarks. Remarks input here can help to remind you why you are applying for leave on behalf of the staff.

**Remarks**

Step 9: Choose the name/s of the staff you are doing a block leave for by putting a tick beside their names.

<input type="checkbox"/>	Employee	Department	Applied Working Days
<input type="checkbox"/>	Ariel Norman	Human Resources	1
<input type="checkbox"/>	Arra Jones	Human Resources	1
<input type="checkbox"/>	Ava Miller	Human Resources	1
<input type="checkbox"/>	Billy Joe	Finance and Payroll	1
<input type="checkbox"/>	Celly Hernandez	Accounting	1
<input type="checkbox"/>	Charlie Thomas	Accounting	1
<input type="checkbox"/>	Claire Smith	Operations	1
<input type="checkbox"/>	Clark Anderson	Accounting	1
<input type="checkbox"/>	Deib Enrile	Finance and Payroll	1
<input type="checkbox"/>	Faith Prince	Part-Time	1

Showing 1 to 10 of 40 entries (filtered from 1 total entries)

Previous **1** 2 3 4 Next

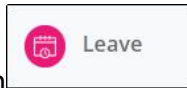
Step 11: Click on  to apply the Block Leave.

## Entitlement & Details

The Entitlement & Details page allows you to set the entitlement and details such as the workweek of the staff.

Note that this page does not show you the leave balance of the staff. For that, you need to use the Leave Balance Report.

The steps to using this page are:



Step 1: Click on



Step 2: Click on



Step 3: Click on

The following page display of the opening balance depends on the configuration. For the Annual leave, If you set it to earned leave, you will see 0 at the Opening Balance. If you had chosen entitlement, you will see the entitlement that is full amount or the prorated amount in the Opening Balance.

Please Take note - Accounts created from 20 June 2022 onwards, Opening Balance will be zero regardless of their Annual Leave Entitlement Policy.

Employee ID	Employee	Department	Yearly Entitlement	Opening Balance	As at date (dd/mm)	Adjustment	Join Date	Grade	Working On PH	Action
	Ariel Norman	Human Resources	14	0	01/01/2022	-1	01/10/2020	Rank & File	<input type="checkbox"/>	
	Arra Jones	Human Resources	14	0	01/01/2022	0	01/10/2020	Rank & File	<input type="checkbox"/>	
	Ava Miller	Human Resources	14	0	01/01/2022	0	01/10/2020	Rank & File	<input type="checkbox"/>	
	Billy Joe	Finance and Payroll	18	0	01/01/2022	-1	01/01/2020	Manager	<input type="checkbox"/>	
	Celly Hernandez	Accounting	14	0	01/01/2022	-1	01/10/2020	Rank & File	<input type="checkbox"/>	
	Charlie Thomas	Accounting	14	0	01/01/2022	0	01/10/2020	Rank & File	<input type="checkbox"/>	
	Claire Smith	Operations	16	0	01/01/2022	0	01/01/2020	Supervisors	<input type="checkbox"/>	

Step 4: If you configure your leave to have grades, you can select the job grades of each of the staff so that the correct entitlement will be allocated for them.

Step 5: If the staff needs to work on Public Holiday, you need to click on the Working on PH column. This would allow the staff to take leave even if is Public Holiday. By default, staff cannot take leave on Public Holiday.



Step 6: Click on


Quick Tip: If the leave balance report you generated has incorrect balances, you can check the Entitlement and Details page for any discrepancies. Check out the sample scenarios below:

Sample 1: After doing a Leave Balance Transfer with a set expiry date, you generate a leave balance report for Annual (Brought Forward) Leave type and you see inconsistencies in the report, you can follow the steps below:

Step 1: On the Entitlement and Details page, filter leave type to Annual (Brought Forward)

Department	Yearly Entitlement	Opening Balance	As at date (dd/mm)	Adjustment	Join Date	Grade	Working On PH	Action
Human Resources	14	0	01/01/2022	-1	01/10/2020	Rank & File	<input type="checkbox"/>	

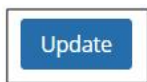


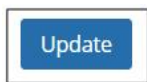
Step 2: Look for the name of the concerned staff and click on the  (pencil icon) under the Action column. This will bring you to another page that will display more details about the staff's Annual (Brought Forward) leave type:

Yearly Entitlement: 0  
**Opening Balance: 5**  
 As at date (dd/mm): 01/01/2022  
 LBF: 0  
 LBF Forfeited: 0  
 Join Date: 01/10/2020

Grade: Rank & File  
 Recommending Officer:   
 Approving Officer: nielsie   
 Working On PH:

Step 3: From here, you can modify the opening balance of the staff as necessary, and don't



forget to click on the  button on the lower right corner once done to save the changes.

Sample 2: After doing a Leave Balance Transfer with no expiry date set, you generate a leave balance report for Annual Leave type and you see inconsistencies in the report, you can follow the steps below:

Step 1: On the Entitlement and Details page, filter leave type to Annual


Block Leave Entitlement & Details Leave Actions Adjustments Transfer Leave Balance Process Resignation Child Details

Leave Type: Annual Year: 2022 Work Week: All Import Entitlement Details

Show 10 entries Search:

Employee ID	Employee	Department	Yearly Entitlement	Opening Balance	As at date (dd/mm)	Adjustment	Join Date	Grade	Working On PH	Action
<input type="checkbox"/>									<input type="checkbox"/>	



Step 2: Look for the name of the concerned staff and click on the  (pencil icon) under the Action column. This will bring you to another page that will display more details about the staff's Annual leave type:

Block Leave Entitlement & Details Leave Actions Adjustments Transfer Leave Balance Process Resignation Child Details

Ariel Norman Leave Type: Annual Year: 2022

Yearly Entitlement: 14

Opening Balance: 0

As at date (dd/mm): 01/01/2022

LBF: 2

LBF Forfeited: 0

Join Date: 01/10/2020

Grade: Rank & File

Recommending Officer: [User Icon] [X]

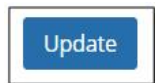
Approving Officer: nielsie [User Icon] [X]

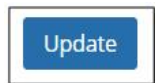
Working On PH:

Gender: Female

Marital Status: Single

Step 3: From here, you can modify the opening balance of the staff as necessary, and don't



forget to click on the  button on the lower right corner once done to save the changes.

## Leave Action

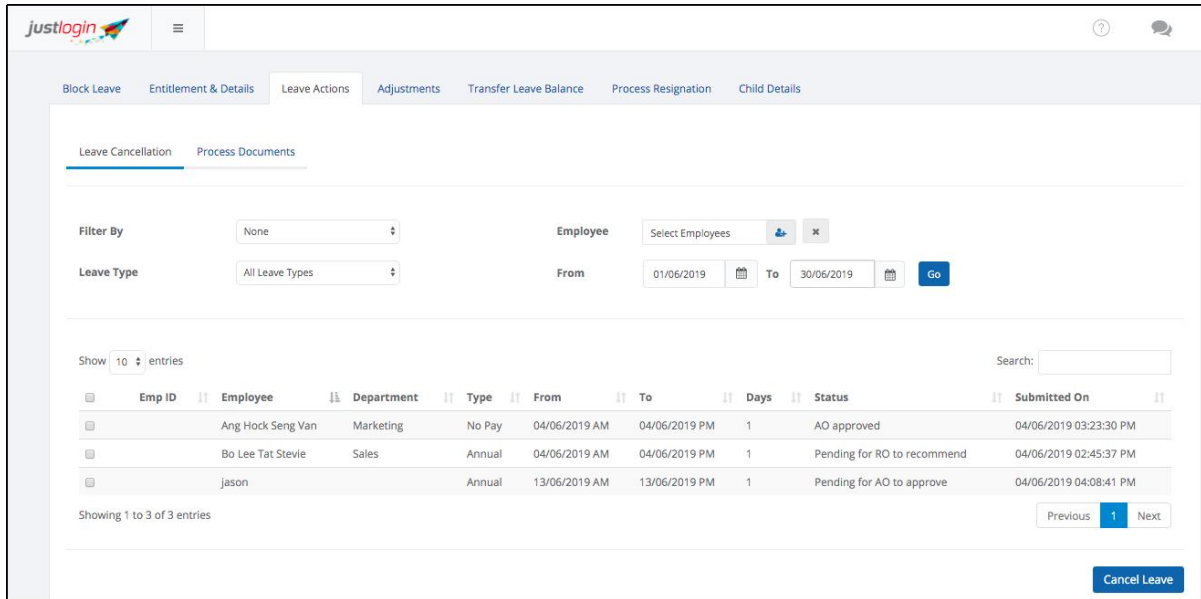
### Leave Cancellation

As a leave administrator, you can cancel the leave of the staff by following these steps:

Step 1: Click on 

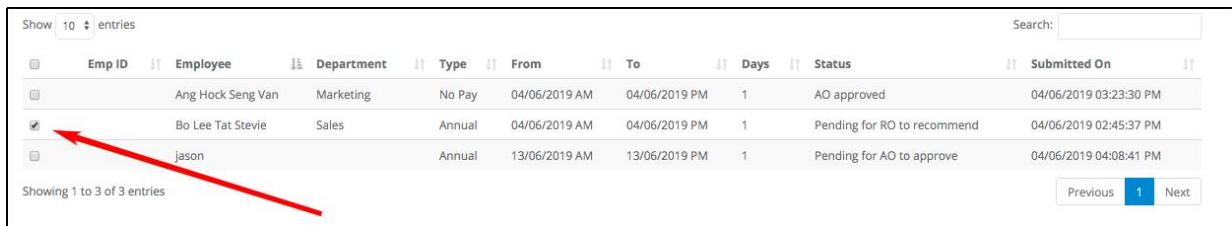
Step 2: Click on 

Step 3: Click on . You will see this page.

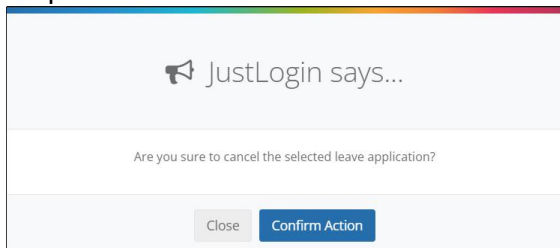


Step 4: By default, you will see the Leave Cancellation page.

Step 5: Select the staff you wish to cancel the leave by ticking on the checkbox at the row of the name.



Step 6: Click on the Cancel Leave button below. The following message will appear



Step 7: Click on Confirm Action to proceed with the cancellation of leave.



## Process Documents

Note: This page is for hardcopy received by the Administrator. If a soft copy will suffice need to make changes in the Leave type page see **Creating New Leave Type Step#14** "requires submission of hardcopy documents" no need to enable it

Step 1: Click on

Step 2: Click on

Step 3: Click on . You will see this page.

<input type="checkbox"/>	Employee ID	Employee	Department	Leave Type	From	To	Days	Status	Submitted On
<input type="checkbox"/>		Ariel Norman	Human Resources	No Pay	19/10/2022 AM	19/10/2022 PM	1	AO approved	19/10/2022 09:18:08 AM
<input type="checkbox"/>		Arra Jones	Human Resources	No Pay	19/10/2022 AM	19/10/2022 PM	1	AO approved	19/10/2022 04:09:33 PM
<input type="checkbox"/>		Billy Joe	Finance and Payroll	No Pay	11/10/2022 AM	11/10/2022 PM	1	AO approved	11/10/2022 03:39:20 PM

Step 4: Click on

Step 5: (Optional) You can filter the documents through the different filters such as documents, leave types, grades and range of date.

Step 6: Click on

Step 7: The system will generate the list based on your search parameter. If the checkbox is empty, it meant that the hard copy of the document for this leave has yet to be received while a checkbox with a tick represents that the administrator had received the document.

Show 10 entries

<input type="checkbox"/>	Employee ID	Employee	Department	Leave Type	From	To	Days	Document
<input type="checkbox"/>		Jerry Smith	Operations	Sick Leave*	07/10/2022 AM	07/10/2022 PM	1	<input checked="" type="checkbox"/> admin
<input type="checkbox"/>		Terrence Romeo	Workforce	Sick Leave*	11/10/2022 AM	11/10/2022 PM	1	<input type="checkbox"/>

Showing 1 to 2 of 2 entries

Previous 1 Next

Step 8: When the administrator receives the hard copy document, the administrator can check the checkbox and click on the **Document Received** button.

By clicking on this, the staff will no longer receive the reminder from the system.

## Adjustments

### Adjustments

You can easily credit leaves to your staff by using the Adjustment feature on the Leave module. This can be used when the Public Holiday falls on a weekend or if staff worked on a Public Holiday

Steps

Step 1: Click on

Step 2: Click on **Administration**

Step 3: Click on **Adjustments** This should bring you to the **Adjustment** page

Step 4: Select leave type you wish to add / deduct

at

Step 5: Set the number of days you wish to credit /debit in the field

at

Step 6: The effective date will always be set to the current date and the expiry date to the end of year. This means the credited leave can be used by the staff before the set expiry

date.

Step 7: On   please make sure it is set to Credit or Debit accordingly

Step 8: (Recommended) Enter a remark about why you did the adjustment. This will help to remind you why you are crediting the leave type/days to the staff. Any remark input here can also be seen by the staff on their end

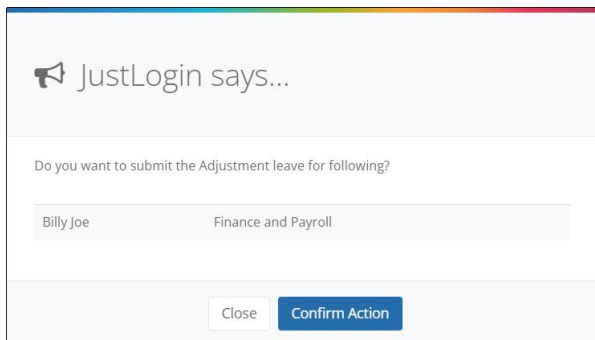
Remarks	Remarks here...
---------	-----------------

Step 9: Select the employee/s you wish to do an adjustment for



Step 10: Click on

Step 11: Once done, you should see this message prompting you to confirm the adjustment.



JustLogin says...

Do you want to submit the Adjustment leave for following?

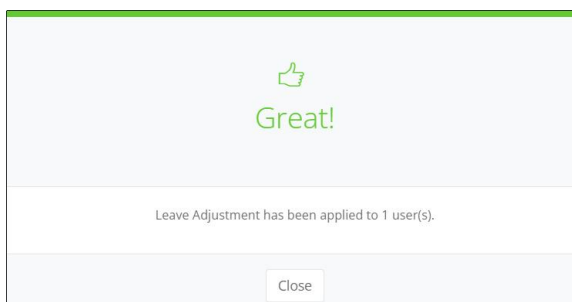
Billy Joe Finance and Payroll

Close Confirm Action



Step 12: Click on

Step 13: Once the leave has been adjusted, the following message will appear.













Great!

Leave Adjustment has been applied to 1 user(s).

Close

## View Adjustment History

This page will display all the adjustments that the leave administrator has done for the staff within the year indicated. This can be filtered based on leave types or adjustment year.

Employee ID	Employee	Leave Type	No. of days	Effective Date	Expiry Date	Taken	Action By	Remarks	Status	Action
	Celly Hernandez	Annual	-1	01/01/2022	31/12/2022	0	nielsie	(Leave Encashment) Staff requested to encash one day of annual leave	Active	 
	Arra Jones	Annual	-1	01/01/2022	31/12/2022	0	nielsie	(Leave Encashment)	Active	 
	Billy Joe	Annual	1	28/10/2022	31/12/2022	0	nielsie		Active	 
	Billy Joe	Annual	-1	01/01/2022	31/12/2022	0	nielsie	(Leave Encashment)	Active	 
	Claire Smith	Annual	-1	01/01/2022	31/12/2022	0	nielsie	(Leave Encashment)	Active	 

## Transfer Leave Balance

The system performs an automatic Annual Leave balance transfer every 31st of December (for Calendar Year policy). Before the end of the year, the Leave Administrator will need to setup the necessary parameters for system to use based on the company's policies.

### Note:

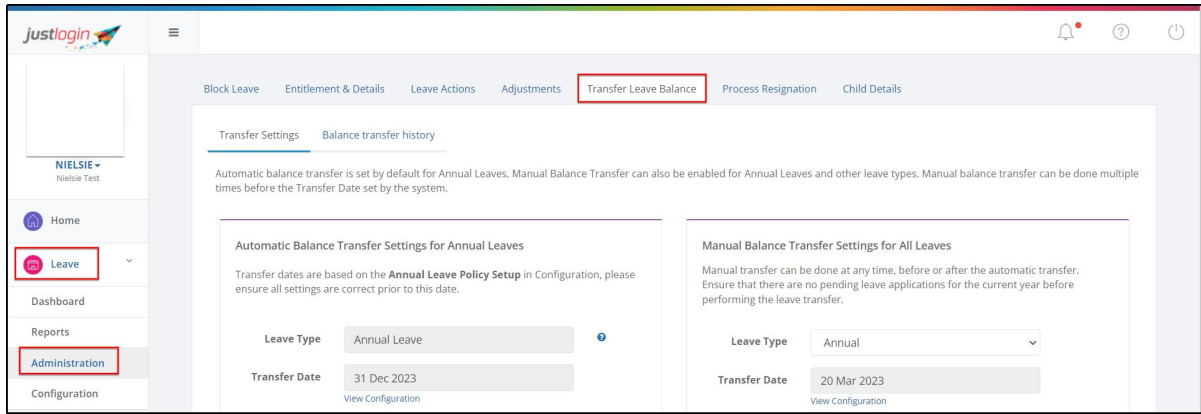
- If you follow Financial Year policy, the balances will be transferred at the end of the Financial Year
- If you follow Employee Anniversary policy, the balances will be transferred at the anniversary date of the employee
- For new customers whose policy does not require leave balance transfer, just skip the configuration step

### Steps

Step 1: Log in to your account.

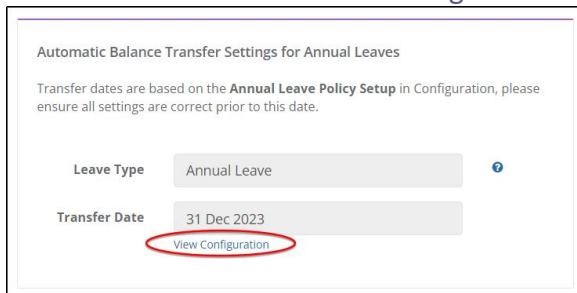
Step 2: From the main menu, go to  then .

Step 3: Click the  tab at the top.



## Transfer Settings

### Automatic Balance Transfer Settings for Annual Leaves

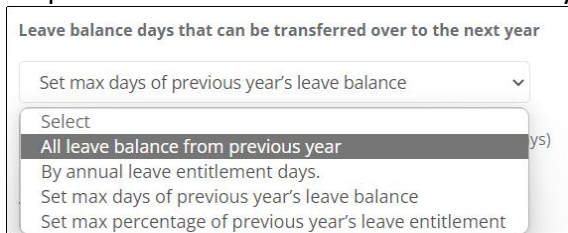


Leave Type – should reflect the account’s leave accrual policy from the Leave Configuration

Transfer Date – by end of the year(Calendar Year/Financial Year/Employee Anniversary based on company policy)

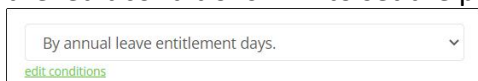
Step 4: Click the View Configuration link to set and edit the settings.

Step 5: Set the number of Annual Leave days you allow to be transferred to the next year.



Option 1: All leave balance from previous year - the system will transfer any remaining leave balance from the current year over to the following year.

Option 2: By annual leave entitlement days – the setting can be set by entitlements. Click on the ‘edit conditions’ link to set the policy, and a pop-up window will appear.



e.g. For employees with 12 days entitlement, up to 5 days can be transferred. For those with 15, up of 6 days. For those with 20 days entitlements, they can transfer up to a maximum of 7 days.

Annual leave entitlement	Max. unused leave to be carried over
12	5
15	6
20	7
Enter number here	Enter number here

Close

Option 3 – Set max days of previous year's leave balance - the admin can set a specific number of days that can be transferred to the following year.

e.g. Only allow a maximum of 5 days of this year's balance to be transferred to the next

year.

Set max days of previous year's leave balance ▾

5 days of previous year's leave balance (max 100 days)

Option 4 – Set max percentage of previous year's leave entitlement - the system will only transfer a certain percentage of previous year's entitlement.


e.g. If employee has 12 days entitlement for 2022, only 50% or 6 days will be transferred to 2023.

Leave balance days that can be transferred over to the next year

Set max percentage of previous year's leave entitlement ▾

50 % of previous year's leave entitlement (max 200%)

Step 6: If options 2, 3, or 4 above is selected, an additional setting for forfeited leaves will show up. This will allow the employees to still use any remaining leaves until the next year, on top of the set number of transferred leaves. If no expiry is set, any remaining balance will be forfeited on the transfer date.

Expiry date of any remaining leave balance  

**NOTE:** If there is no expiry date set, any remaining leave balance will be forfeited on the Transfer Date

Step 6: Set the expiration date of the transferred leave, if applicable.

Transferred leave balance expiry

No expiry ▾

Select expiry setting

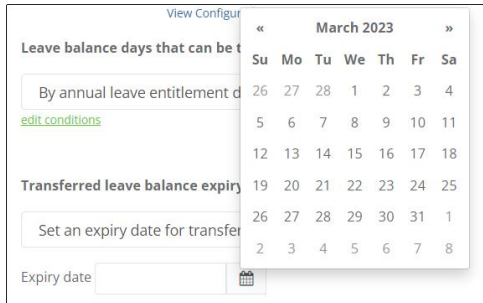
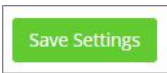
No expiry

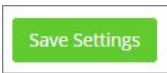
Set an expiry date for transferred leave balance

No Expiry – transferred leave balance will not expire

Set an expiry date for transferred leave balance – set a specific date on when the transferred leave(s) will expire

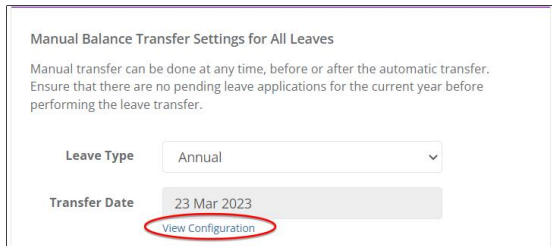
Step 7: If adding an expiry, click the calendar to select the date.

Step 8: Don't forget to click .

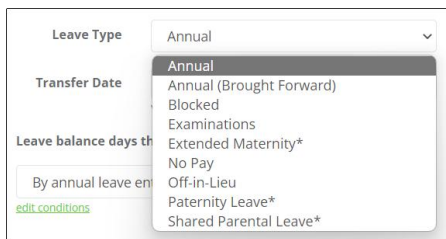
### Manual Balance Transfer Settings for All Leaves

When applicable, you may still choose to do a manual leave transfer before or after 31 Dec. An auto transfer will be done for Annual Leave, but for all other leaves, transfer will need to be manually initiated.



Same Configuration Settings as above(steps 5-8). The only difference in the Manual Balance Transfer settings is the option to select the leave type you wish to transfer to the following year.

Step 1: Select the Leave Type you want to transfer to the next year.



Step 2: Set the number of leave days you allow to be transferred.

**Leave balance days that can be transferred over to the next year**

Set max days of previous year's leave balance ▼


Select

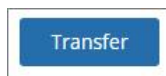
- All leave balance from previous year (ys)
- By annual leave entitlement days.
- Set max days of previous year's leave balance
- Set max percentage of previous year's leave entitlement

Step 3: Set the expiry date, if applicable. Otherwise, select No Expiry.

**Transferred leave balance expiry**


Set an expiry date for transferred leave balance ▼

Expiry date  

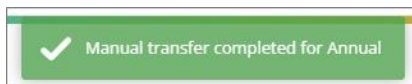


Step 4: Click the  button to initiate the actual transfer.

A pop-up message will show to confirm action.




 Just to confirm..

Do you want to transfer all your staffs leave balance from 2022 to 2023?



## Transfer History

This page will show all leave balance transfers that were done on the account.

Transfer Settings		Balance transfer history			
Show <span>10</span> <span>▼</span> entries	<span>1</span>	<span>2</span>	<span>3</span>	<span>4</span>	Search <span>5</span> <span>6</span>
Transaction Date	Transfer By	Leave Type	Transfer Type	Transfer Status	Action
28/02/2023 17:00:59	Gracielle	Annual	Auto Transfer	Pending	
15/02/2023 17:00:58	Gracielle	Annual	Auto Transfer	Completed	
14/02/2023 17:01:02	Gracielle	Annual	Auto Transfer	Completed	

1. Transaction Date – when the leave transfer was done

2. Transfer By – who initiated the leave transfer

3. Leave Type – the type of leave that was transferred



4. Transfer Type – whether it's Auto Transfer or Manual Transfer

5. Transfer Status – the status of the transfer

6. Action – view the transfer details

### Transfer Status

Transfer Status
Pending
Completed
Completed

- Pending – settings have been saved, actual transfer is pending
- Completed with a warning sign – transfer is done but with error/s
- Completed – transfer has been done

After the Leave Transfer:

- the transferred leave will reflect under 'Balance from previous year' in the leave summary and reports

Employee ID	Employee	Entitlement (A)	Balance from previous year (B)	Balance as at (dd/mm) (C)	Earned Leave As At 01/01/2023 (D)	Adjustment (E) E=E1-E2-E3				Leave Approved (F)	Balance As At 01/01/2023 (C+D+E-F)	Join Date
						E (Available)	E1 (Total)	E2 (Expired)	E3 (Taken in previous or next year)			
	Dora Explorer	8.00	8.00	0 (1/1)	0.33	8.00	8	0	0	0.00	8.00	16/09/2020
	Gracielle	15.00	15.00	0 (1/1)	0.62	15.00	15	0	0	0.00	16.00	03/11/2009
0004	Ron Weasley	16.00	14.00	0 (1/1)	0.67	14.00	14	0	0	0.00	15.00	01/04/2019
0005	Harry Potter	15.00	15.00	0 (1/1)	0.62	15.00	15	0	0	0.00	16.00	05/07/2011
0006	Jean Grey	14.00	14.00	0 (1/1)	0.58	14.00	14	0	0	0.00	15.00	27/07/2020
0007	Kitty Hello	18.00	18.00	0 (1/1)	0.75	18.00	18	0	0	0.00	19.00	18/07/2001
0008	Benny Anderson	18.00	16.00	0 (1/1)	0.75	16.00	16	0	0	0.00	17.00	01/02/2017
0009	Xian Lim	15.00	15.00	0 (1/1)	0.62	15.00	15	0	0	0.00	16.00	18/05/2020
0010	Jen Xuan	18.00	18.00	0 (1/1)	0.75	18.00	18	0	0	0.00	19.00	01/07/2015
0011	Lady Bug	13.00	12.00	0 (1/1)	0.54	12.00	12	0	0	0.00	13.00	01/03/2018

- if 'No Expiry' is set, the transferred leave will be added to the next year's opening balance

Leave Type	Entitlement (A)	Balance from previous year	Balance As At 01/01/2023 (C)	Since As At 01/01/2023 (D)	Adjustment (E) E=E1-E2-E3				Leave Taken (F)	Current Balance (C+D+E-F)	Rounded Balance	Balance as at 31/12/2023
					E (Available)	E1 (Total)	E2 (Expired)	E3 (Taken in previous or next year)				
Annual Leave	9	1	1	9	0	0	0	0	0	10	10	10

- if expiration date has been added, the transferred leave will reflect under Adjustments

Leave Summary

Year: 2023

Widget View Table View

Leave Type	Entitlement (A)	Balance from previous year	Balance As At 01/01/2023 (C)	Since As At 01/01/2023 (D)	Adjustment (E) E=E1-E2-E3				Leave Taken (F)	Current Balance (C+D+E-F)	Rounded Balance	Balance as at 31/12/2023
					E (Available)	E1 (Total)	E2 (Expired)	E3 (Taken in previous or next year)				
Annual Leave	9	1	0	9	1	1	0	0	0	10	10	9

Block Leave Entitlement & Details Leave Actions Adjustments Transfer Leave Balance Process Resignation Child Details

Leave Type: Annual Year: 2023 Work Week: All Import Entitlement Details

Show 10 entries Search:

Employee ID	Employee	Department	Yearly Entitlement	Opening Balance	As at date (dd/mm)	Adjustment	Work Week	Join Date	Grade	Working On PH	Action
1432	Anakin Skywalker	Professional Mgmt	14	0	01/06/2022	4	Normal	01/06/2022	HR	<input type="checkbox"/>	
0018	Anna Arendelle	Professional Mgmt	0	0	15/05/2022	3	Normal	15/05/2021	Default Grade	<input type="checkbox"/>	
0008	Benny Anderson	Consulting	18	0	01/02/2023	16	Normal	01/02/2017	Consultant	<input type="checkbox"/>	
0014	Cherub Cherub	Professional Mgmt	10	0	08/06/2022	11	Normal	08/06/2020	Strategy	<input type="checkbox"/>	
0023	Chuckie Nestle	Strategy	8	0	16/08/2022	8	Normal	16/08/2020	Executive	<input type="checkbox"/>	
0016	Cindy Cinderella	Professional Mgmt	15	0	08/05/2022	15	Alternate 3	08/05/2020	IT	<input type="checkbox"/>	

Block Leave Entitlement & Details Leave Actions Adjustments Transfer Leave Balance Process Resignation Child Details

Adjustment View Adjustment History

Leave Type: All Status: All Adjustment For Year: 2023 Go

Show 10 entries Search:

Employee ID	Employee	Leave Type	No. of days	Effective Date	Expiry Date	Taken	Action By	Remarks	Status	Action
0011	Lady Bug	Annual	11	01/03/2023	30/12/2023	0	Gracielle	Balance Transfer	Active	
0005	Harry Potter	Annual	15	01/01/2023	30/12/2023	0	Gracielle	Balance Transfer	Active	
0023	Chuckie Nestle	Annual	8	01/01/2023	30/12/2023	0	Gracielle	Balance Transfer	Active	
0015	Luigi Mario	Annual	8	01/01/2023	30/12/2023	0	Gracielle	Balance Transfer	Active	
0024	Snow White	Annual	14	01/01/2023	30/12/2023	0	Gracielle	Balance Transfer	Active	
0016	Cindy Cinderella	Annual	15	01/01/2023	30/12/2023	0	Gracielle	Balance Transfer	Active	

## Process Resignation

The Process Resignation is useful especially if you are using earned leave to help you project the leave balance of a staff who is intending to resign.

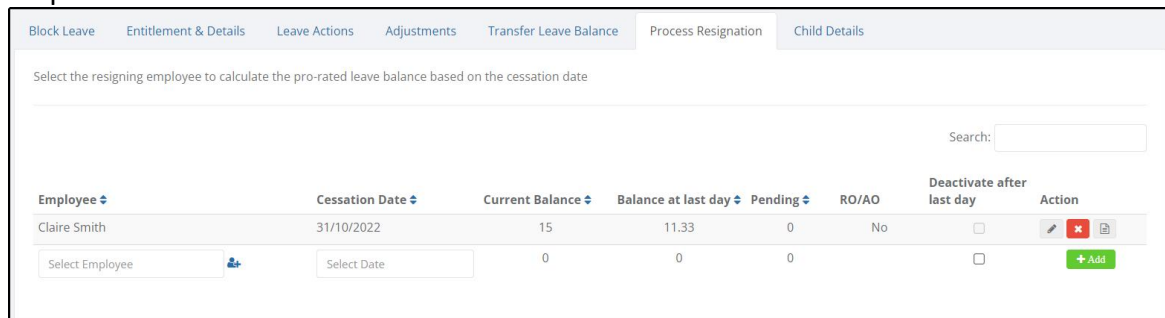
Note: This is only a view page and does not have impact to the reports pages and Staff side viewing of his/her own balance





The Process Resignation steps are:

Step 1: Click on 

Step 2: Click on 


Step 3: Click on 



Employee	Cessation Date	Current Balance	Balance at last day	Pending	RO/AO	Deactivate after last day	Action
Claire Smith	31/10/2022	15	11.33	0	No	<input type="checkbox"/>	  
Select Employee	Select Date	0	0	0		<input type="checkbox"/>	

Step 4: Click on  Select Employee

Step 5: Enter the Cessation Date

Step 6: Put a tick in the box under the  column if you would like system to auto deactivate after last day.

Step 7: Click on 

## Child Details


If the staff are entitled to any childcare related leave types such as Enhanced and Extended childcare leave, you need to enter the child information in the system.

To enter the child details, follow these steps:

Step 1: Click on 

Step 2: Click on 

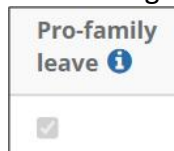
Step 3: Click on  tab at the top

Step 4: Select Employee by clicking on 

Step 5: Enter the youngest child's name

Step 6: Enter the Birth Date. Once the Birth Date of the child is entered, the Leave Start Year column will automatically be populated based on the Birth Date column or you can also input 1 year after the Year of Birth of the child.

Step 7: Indicate whether the child is a Singaporean. If the child is a Singaporean, put a tick at the Pro-family leave column. If the child is non-Singaporean, please leave it unticked.



#### NOTES:

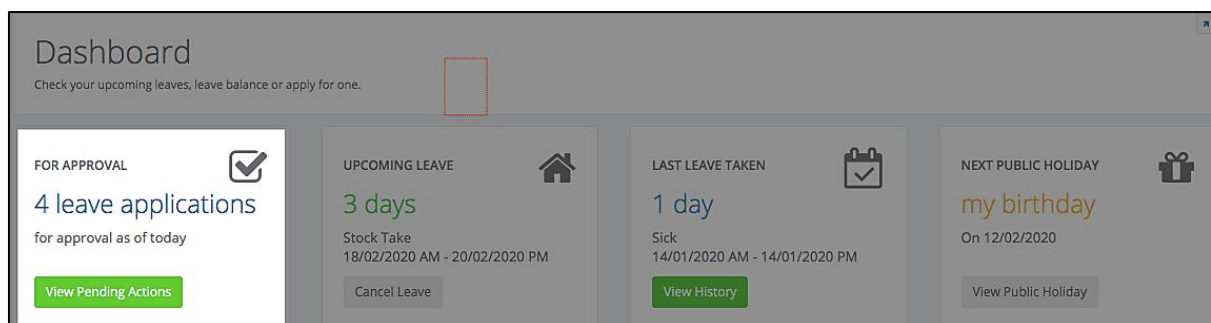
- For Maternity leave type, no child details are necessary as this leave is available to all female staff as a default
- For Extended Maternity\*, child details are needed to be input in order for this leave type to be available on the staff's end. Kindly ensure that you put a tick on "Pro-Family Leave" column as well.

## Approval

### Pending Actions

Anyone that is being appointed as the Recommending Officer or Approving Officer will have access and see the Approval section on the Leave Dashboard when the staff under them applies for leave.

Step 1: Click on  at Dashboard.



The following page will appear.

Pending Actions | Approval History | My Staff Leave Summary | Delegation

Show 10 entries Search:

<input type="checkbox"/>	Employee Name	From	To	Leave Type	Duration	My Role	Remarks	Action
<input type="checkbox"/>	Jerry Smith	29/03/2023 AM	29/03/2023 PM	No Pay	1	Pending For AO To Approve	<input type="text"/>	View <input type="button" value="Approve"/> <input type="button" value="Reject"/>
<input type="checkbox"/>	Loren Gates	27/03/2023 AM	28/03/2023 PM	Sick Leave*	2	Pending For AO To Approve	<input type="text"/>	View <input type="button" value="Approve"/> <input type="button" value="Reject"/>
<input type="checkbox"/>	nielsie	10/04/2023 AM	10/04/2023 PM	Annual	1	Pending For AO To Approve	<input type="text"/>	View <input type="button" value="Approve"/> <input type="button" value="Reject"/>

Showing 1 to 3 of 3 entries Previous 1 Next

Step 3: Click on  to view the leave detail as well as any attachments. Click on  to approve the leave or click on the  to reject the leave.

Step 4: If click on , you will see the page below:

Leave Info

Leave Type: Sick Leave\*

Employee: Loren Gates

Leave Period: 27/03/2023 AM To 28/03/2023 PM

Duration: 2

Date of application: 23/03/2023 15:58 PM

Reason:

Leave Status: PENDING

Attachment:  If there are attachment, you can click here to see the detail of the attachment.

CC To Other Persons:

Overseas Address:

CC Lists:

Leave Action Remarks:

This application is pending approval by nielsie.

Sick Leave\*

Balance As At 01/01/2023	0
Adjustment	0
Taken Since 01/01/2023	0
<b>Leave Balance</b>	<b>14</b>
Pending	2

Step 5: After viewing you can then decide to approve or reject or cancel the leave in this page.

## Approval History

The RO and the AO can review all the leaves they had approved or rejected. Depending on the settings of the leave administrator, the RO and AO can through this page cancel the leave of the staff as well.

Step 1: Click on  at Dashboard.

Dashboard

Check your upcoming leaves, leave balance or apply for one.

**FOR APPROVAL**

4 leave applications  
for approval as of today

[View Pending Actions](#)

**UPCOMING LEAVE**

3 days

Stock Take  
18/02/2020 AM - 20/02/2020 PM

[Cancel Leave](#)

**LAST LEAVE TAKEN**

1 day

Sick  
14/01/2020 AM - 14/01/2020 PM

[View History](#)

**NEXT PUBLIC HOLIDAY**

my birthday

On 12/02/2020

[View Public Holiday](#)

Step 2: Click on Approval History You should see this page

Pending Actions **Approval History** My Staff Leave Summary Delegation

From nielsie In 2023 Leave Type All Leave Types For Employee Name All

Show 10 entries Search:

Employee Name	From	To	Leave Type	Duration	Reason	My Action	Action Date	Action
nielsie	10/04/2023 AM	10/04/2023 PM	Annual	1		Approved	23/03/2023 PM	
Jerry Smith	29/03/2023 AM	29/03/2023 PM	No Pay	1		Approved	23/03/2023 PM	
Loren Gates	27/03/2023 AM	28/03/2023 PM	Sick Leave*	2		Approved	23/03/2023 PM	
nielsie	22/03/2023 AM	23/03/2023 PM	Hospitalisation Leave*	2		Rejected	23/03/2023 PM	
nielsie	04/01/2023 AM	04/01/2023 PM	Annual	1		Rejected	23/03/2023 PM	
Loren Gates	01/12/2022 AM	01/12/2022 PM	Annual	1		Rejected	23/03/2023 PM	
nielsie	30/11/2022 AM	30/11/2022 PM	Annual	1		Rejected	23/03/2023 PM	
nielsie	10/10/2022 AM	10/10/2022 PM	Annual	1		Rejected	23/03/2023 PM	
Patricia Jenkins	22/03/2023 AM	22/03/2023 PM	Sick Leave*	1	Block leave.	Approved	22/03/2023 AM	
Peter Harrington	22/03/2023 AM	22/03/2023 PM	No Pay	1	Note : Block leave. Staff requested to file NPL	Approved	22/03/2023 AM	

Step 3: (optional) You can filter the leave according to leave type and/or employees


From nielsie In 2023 Leave Type All Leave Types For Employee Name All

Step 4: Click on the  at the Actions column to view the leave details.

**Leave Info**

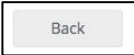
Leave Type	Annual
Employee	nielsie
Leave Period	10/04/2023 AM To 10/04/2023 PM
Duration	1
Date of application	23/03/2023 15:56 PM
Reason	
Leave Status	<b>APPROVED</b>
Attachment	No attachments available
CC To Other Persons	
Overseas Address	
AO Remarks	

This application was approved by nielsie on 23/03/2023.



Annual	
Balance As At 01/01/2023	5
Adjustment	0
Taken Since 01/01/2023	5
<b>Leave Balance</b>	<b>18</b>
Pending	0

[Back](#)


Step 5: Click on  to get back to the previous page.

## My Staff Leave Summary

This page allows the RO/AO to view the leave balance of the staff they are in charge of. To see this page, follow these steps:

Step 1: Click on  at Dashboard.


**Dashboard**  
Check your upcoming leaves, leave balance or apply for one.

FOR APPROVAL 

**4 leave applications**

for approval as of today


[View Pending Actions](#)

UPCOMING LEAVE 

**3 days**

Stock Take  
18/02/2020 AM - 20/02/2020 PM


[Cancel Leave](#)

LAST LEAVE TAKEN 

**1 day**

Sick  
14/01/2020 AM - 14/01/2020 PM

[View History](#)

NEXT PUBLIC HOLIDAY 

**my birthday**

On 12/02/2020

[View Public Holiday](#)

Step 2: Click on 

Pending Actions Approval History My Staff Leave Summary Delegation

Leave Type: Annual Year: 2023

Show 10 entries Search:

Employee ID	Employee	Entitlement	LBF	Adjustment D1-D2-D3			Taken	Pending	Balance	Expiry Date
				D (Available)	D1 (Total)	D2 (Expired)				
Arra Jones	14	0	-3	-3	0	0	0	0	11	
Ava Miller	14	0	0	0	0	0	0	0	14	
Billy Joe	18	0	-2	-2	0	0	1	0	15	
Celly Hernandez	14	0	-2	-2	0	0	0	0	12	
Charlie Thomas	14	0	-3	-3	0	0	0	0	11	
Claire Smith	16	0	0	0	0	0	0	0	21	
Clark Anderson	14	0	0	0	0	0	1	0	13	
Gary King	14	0	-1	-1	0	0	0	0	18	
George Moore	14	5	-2	-2	0	0	0	0	17	
Gladys Smith	14	5	0	0	0	0	0	0	19	

Step 3: You can filter the leave according to the Leave Type.

Leave Type: Annual Year: 2023

## Delegation

The RO/AO will have the ability to delegate the approving process to another staff if they are going on leave for a certain period of time.

To do that, follow these steps:



Dashboard

Check your upcoming leaves, leave balance or apply for one.

FOR APPROVAL

4 leave applications

for approval as of today

[View Pending Actions](#)

UPCOMING LEAVE

3 days

Stock Take  
18/02/2020 AM - 20/02/2020 PM

[Cancel Leave](#)

LAST LEAVE TAKEN

1 day

Sick  
14/01/2020 AM - 14/01/2020 PM

[View History](#)

NEXT PUBLIC HOLIDAY

my birthday

On 12/02/2020

[View Public Holiday](#)



Step 3: Click on

Step 4: Select the staff you wish to delegate the approving rights to at

**Delegation Role To**

Step 5: Select the duration of the delegation

**Select Date**  To

Step 6: Click on the button to save

Pending Actions Approval History My Staff Leave Summary Delegation

Show  entries Search:

Employee Name	From	To	Duration	Reason	Submitted Date	Action
Ava Miller	01/03/2023	31/03/2023	31		23/03/2023 04:16:39 PM	
Deib Enrile	01/12/2022	31/12/2022	31	For Business Trip	28/11/2022 02:50:54 PM	
Billy Joe	01/10/2022	31/10/2022	31		10/10/2022 10:22:19 AM	

Showing 1 to 3 of 3 entries Previous 1 Next

Step 7: You can cancel the delegation before the stipulated end date by clicking on the icon

## Reports

### Leave Query

Using the leave query, you can do a query on who will be on leave for a particular date range.

The steps are:

Step 1: Click on

Step 2: Click on . The default page that you should see will be the Leave Query page.

Leave Query   Leave Balance   Leave Individual   Special

All Leave Types   All Leave Dates   All Leave Status

Leave Date From: 01/10/2022   To: 31/10/2022

All Departments   All Employees   Sort By: User Name   **Go**

Show 10 entries   Search:

Employee ID	Employee	Department	Grade	Type	From	To	No. of days	Status	Submitted Date	Attachment
	Ariel Norman	Human Resources	Rank & File	No Pay	19/10/2022 AM	19/10/2022 PM	1	Leave Approved by AO	19/10/2022 09:18:08 AM	
	Arra Jones	Human Resources	Rank & File	No Pay	19/10/2022 AM	19/10/2022 PM	1	Leave Approved by AO	19/10/2022 04:09:33 PM	
	Billy Joe	Finance and Payroll	Manager	No Pay	11/10/2022 AM	11/10/2022 PM	1	Leave Approved by AO	11/10/2022 03:39:20 PM	
	Billy Joe	Finance and Payroll	Manager	Blocked	31/10/2022 AM	31/10/2022 PM	1	Leave Approved by AO	10/10/2022 03:29:33 PM	
	Celly Hernandez	Accounting	Rank & File	No Pay	26/10/2022 AM	26/10/2022 PM	1	Leave Approved by AO	26/10/2022 09:14:46 AM	

Step 3: (Optional) You can query by the leave types

All Leave Types

Step 4: (Optional) You can also filter by

All Leave Dates

. Click on the scroll down arrow you can filter by

All Leave Dates

- All Leave Dates
- Submitted Date
- Cancellation Date of Application
- Approval Date of Application
- Rejection Date of Application

Step 5: (Optional) Another filter you can use to sort the data is

the

All Leave Status

. Click on the down arrow and you will see the following option for this.

All Leave Status

- All Leave Status
- Application Cancelled before Approval
- Application Cancelled after Approval
- Application Approved
- Application Rejected
- Pending for Approval of Application
- Pending for Cancellation Approval
- Last year leaves approved in the current year
- Current year leaves approved in the last year

Step 6: Enter the date you wish to query

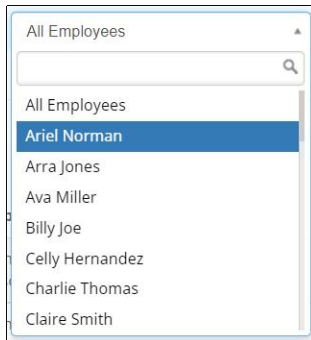
at

Leave Date From: 01/10/2022   To: 31/10/2022

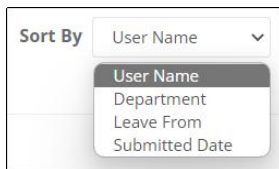
Step 7: (Optional) You can also filter by

All Departments

Step 8: (Optional) You may query the leave of a specific employee by clicking and select the employee at the employee field.



Step 9: (Optional) Apart from all these filters, you can also set how you wish to sort the query results by selecting your preferred order at Sort by:



Step 10: Click on  to start the query.

## Leave Balance

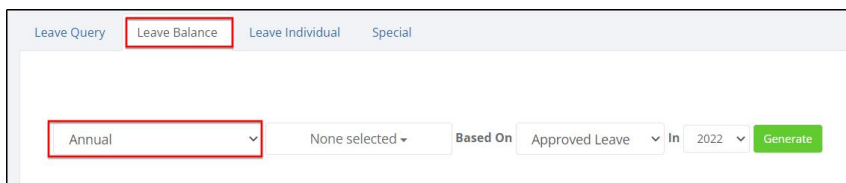
You need to use this report to see the leave balance of the employees. To generate this report, kindly follow these steps:

Step 1: Click on 

Step 2: Click on 

Step 3: Click on 

Step 4: Select the type of leave you wish to check



Click on the down arrow and you will see the list of leave types.

Annual ▾

- Annual
- Adjustment Leave for 2021
- Annual (Brought Forward)
- Blocked
- Childcare (Foreigner)\*
- Childcare (Singaporean)\*
- Examinations
- Extended Childcare Leave\*
- Extended Maternity\*
- Hospitalisation Leave\*
- No Pay
- Off-in-Lieu
- Paternity Leave\*
- Shared Parental Leave\*
- Sick Leave\*
- Unpaid Infantcare\*

None selected ▾

Search

Select all

**Workforce**

- Terrence Romeo
- Toby Parker
- Tommy Yap

**Managers**

Step 5: You can select all employees or specific employee at

Step 6: Then select what you are querying for the leave balance, if Approved leave or

Based On Approved Leave ▾

- Approved Leave
- Consumed Leave

Consumed (used) leave at

In 2022 ▾

Step 7: (Optional) You can select the year of the query at . By default, the system will set the current year as the year.

Generate

Step 8: To start the generation of the leave balance, click on the button and the system will generate the report.




Step 9: Once the system complete the generation of the report, a row will appear. Click the View to see report or the delete icon to delete the report.

Leave Type	Employee	Based On	Based On At	Status	Generated By	Generated Date	Actions
Annual	All Employees	Approved Leave	11/10/2022	Complete	nielsie	11/10/2022 09:39:18 AM	<a href="#">View Report</a> <a href="#">Delete Report</a>

## Leave Individual


The Leave Individual report allows you to view all the leave type and leave balance of a Staff or All Staff is entitled.

To see that, you need to do the following:

- Step 1: Click on 
- Step 2: Click on 
- Step 3: Click on the  tab. You should see this page.

Step 4: (Optional) You can filter the list by selecting a department and also which year (default will be current year)

Year  Department

Step 5a: For Individual : Find the staff you want to see, click on the  icon and the following table comprising all the entitled leave for this staff will appear in the following format.

Employee ID	Employee	Leave Type	Entitlement (A)	LBF (B)	Opening Balance (C)	Adjustment (D) D=D1-D2-D3				Leave Taken (F)	Current Balance (C-D+E-F)	Earned as at Today (E)	Pending
						D (Available)	D1 (Total)	D2 (Expired)	D3 (Taken in previous or next year)				
	nielsie	Annual	18	0	0	-4	-3	1	0	2	13	19	1.5
	nielsie	Annual (Brought Forward)	0	0	0	0	0	0	0	0	0	N.A	0
	nielsie	Childcare (Singaporean)*	6	0	0	0	0	0	0	0	6	N.A	0
	nielsie	Compassionate	3	0	N.A	0	0	0	0	3	N.A	N.A	0
	nielsie	Examinations	5	0	5	0	0	0	0	0	5	N.A	0
	nielsie	Hospitalisation Leave*	60	0	0	0	0	0	0	0	60	N.A	0
	nielsie	In Camp Training	0	0	N.A	0	0	0	0	0	N.A	N.A	0
	nielsie	Marriage	3	0	N.A	0	0	0	0	0	N.A	N.A	0
	nielsie	Maternity	56	0	N.A	0	0	0	0	0	N.A	N.A	0
	nielsie	No Pay	200	0	200	0	0	0	0	3	197	N.A	2.5

Showing 1 to 10 of 13 entries

Previous **1** 2 Next

Back Download Print

Step 5b: For All Staff: Change first the Show 10 entries to Show All entries and left of Employee ID tick the box to choose all Staff.

Show  entries

Employee ID



Next is to scroll down to the bottom of the page and lower right click

**TIPS:**

1) Upper right side there is search you can type in specific words, a Name or Leave Type

Search:

2) Each column in the table has this icon  you can click it to arrange if Ascending or Descending order.

Step 6: (Optional) You can download or print the report by clicking the relevant



buttons.


## Special

The special report is a report where you can use to find out whether the staff had taken certain leave types. For example, the management might want to find out who did not take sick leave at all for the entire year, they may use this report.

To use this report, follow these steps:

Step 1: Click on 

Step 2: Click on 

Step 3: Click on . The following page will appear.

Leave Query   Leave Balance   Leave Individual   Special

Leave Type: Annual

Leave Date From: 01/01/2022 To: 31/12/2022

Minimum Leave Days: 0

Filter By: Those who have taken

Show 10 entries

Employee ID	Employee	Department	Grade	Join Date	Leave Type	No. of days
	Ariel Norman	Human Resources	Rank & File	01/10/2020	Annual	0
	Arra Jones	Human Resources	Rank & File	01/10/2020	Annual	0
	Ava Miller	Human Resources	Rank & File	01/10/2020	Annual	0
	Billy Joe	Finance and Payroll	Manager	01/01/2020	Annual	1
	Billy Joe	Finance and Payroll	Manager	01/01/2020	Annual	1
	Celly Hernandez	Accounting	Rank & File	01/10/2020	Annual	0
	Charlie Thomas	Accounting	Rank & File	01/10/2020	Annual	0
	Claire Smith	Operations	Supervisors	01/01/2020	Annual	1
	Clark Anderson	Accounting	Rank & File	01/10/2020	Annual	0
	Deib Enrile	Finance and Payroll	Rank & File	01/01/2020	Annual	1

Step 4: Select the leave type you are looking for at the

Leave Type: Annual

Step 5: (Optional) Set the date range you want to query at

the 

Leave Date From: 01/01/2022 To: 31/12/2022

. The default will be from the first day of the year to the end of the year.

Step 6: Set the minimum leave days you wish to query

Minimum Leave Days: 2

Step 7: You can filter the query by selecting filter by those who have taken or not take at

the 

Filter By: Those who have taken

 field.

Step 8: Click on the 

Go

 to start the query.

## Personal Calendar

Staff can see their own Leave calendar by simply following these steps:

Step 1: Click on 

Leave

Step 2: Click on 

Dashboard

Step 3: Scroll down to see the calendar

Personal   Staff

By default, the system will show the staff their own personal calendar.

Personal		Staff		Yearly		Monthly																																
2022																																						
	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	
JAN						01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
FEB		01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28									
MAR		01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31						
APR					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				
MAY						01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
JUN			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30						
JUL					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
AUG	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31							
SEP				01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
OCT					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
NOV		01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30							
DEC				01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				

[View leave types](#)

## Staff Calendar

If the administrator sets the calendar to be shared with either within the department or the entire company, then the Staff Calendar option will be available. To view the staff calendar, please follow these steps:

Step 1: Click on 

Step 2: Click on 

Step 3: Scroll down to see the calendar





Personal		Staff		Yearly		Monthly																															
Nielsie Test (my company)		2022		Search By Employee		Show 5 entries Collapse All																															
2022		JAN			FEB			MAR			APR			MAY			JUN			JUL			AUG			SEP			OCT			NOV			DEC		
	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29								
	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T								
<b>Accounting</b> Celly Hernandez Charlie Thomas Clark Anderson <b>Customer Service</b> Nancy Williams Natasha Wilson Nina Brown <b>Finance and Payroll</b> Billy Joe Delb Enrile Mara David Mei Regy Merry Borris																																					

Step 4: You can filter your search by typing the person you are looking for at the  portion and the system will filter out the rest and just list those employees with the keywords entered.