HK Leave Administrator Guide

Introduction *3*

Administration *3*

Block Leave **3**

Entitlement & Details **4**

Leave Actions **5**

Leave Cancellation 5

Process Documents 7

Adjustments **8**

Adjusments 8

View Adjustment History 11

Transfer Leave Balance **11**

Process Resignation **18**

Approval *19*

Pending Actions **19**

Approval History **21**

My Staff Leave Summary **23**

Delegation **24**

Reports *25*

Leave Query **25**

Leave Balance **27**

Leave Individual **29**

Special **31**

Personal Calendar *32*

Staff Calendar *33*

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.

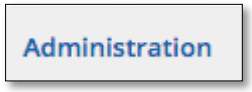
Administration

Block Leave

Leave Administrator can make use of block leave to apply 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:

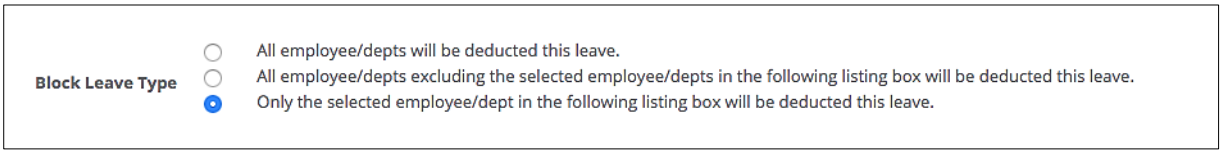
Step 1: Click on

Step 2: Click on 

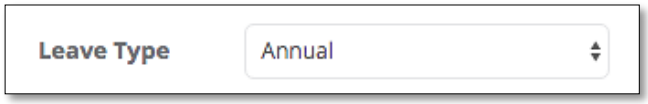
Step 3: Click on

tab at the top

Step 4: Choose the option on how you want to choose the users who are to be included in the block leave



Step 5: Select the leave type for the block leave



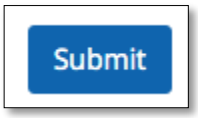
Step 6: (Optional) Anyone you wish to email to inform them of the block leave. As noted above, Block Leave is automatically approved and does not go through the normal approval process. If you want to inform the approving officers of the leave, then you can utilize the CC Lists field.

Step 7: Enter the date range for the block leave

Step 8: The system will automatically compute the number of days based on Step 7.

Step 9: (Optional) Enter remarks. The remarks input here will also appear on the Leave Query report. It can also help to remind you as the Leave Administrator, why the Block Leave was done for the staff.

Step 10:Choose the name/s of the staff who will be included in the block leave by putting a tick beside the name/s.

Step 11: Click on 

to apply the Block Leave.

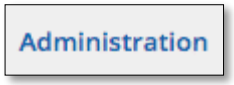
Entitlement & Details

The Entitlement & Details page allow you to set the entitlement and details such as the work week 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.

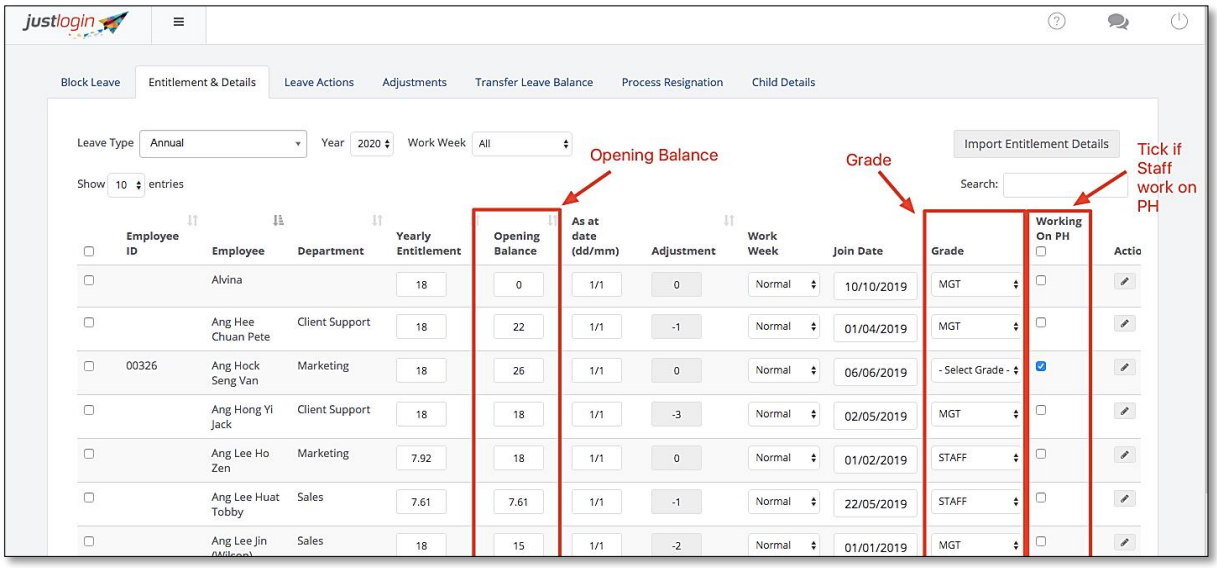
The steps to using this page are:

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.



Step 4: If you configure your leave module 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

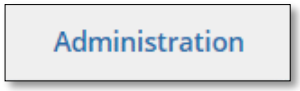
to save changes.

Leave Actions

Leave Cancellation

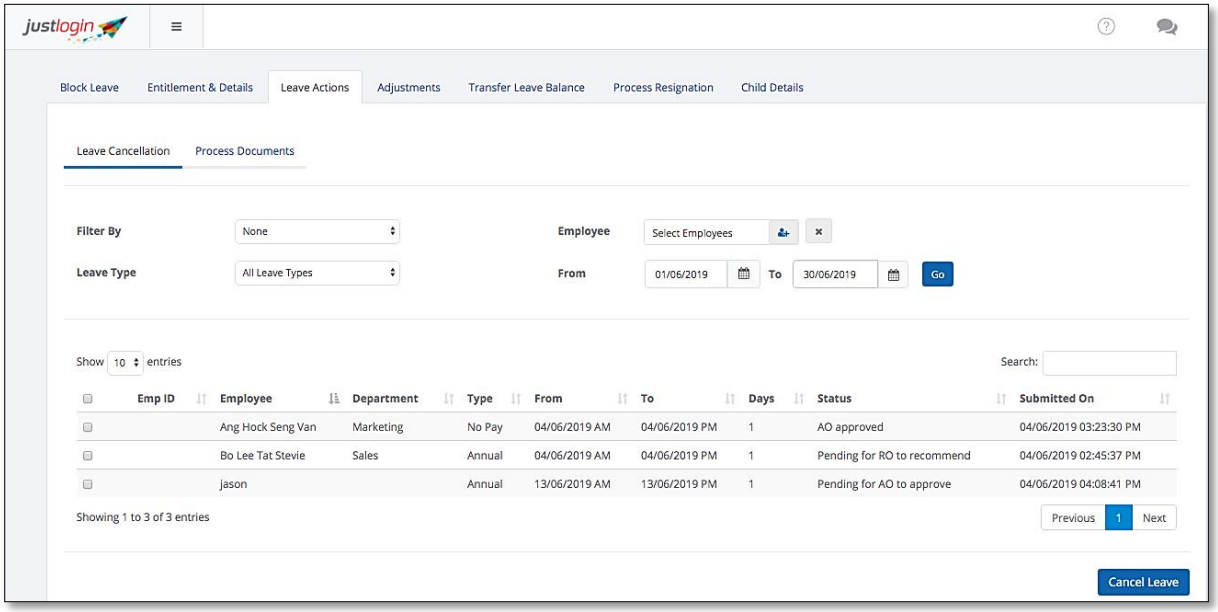
As a leave administrator, you can cancel the leave of the staff by following these steps:

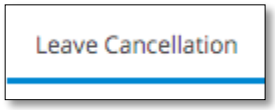
Step 1: Click on

Step 2: Click on 

Step 3: Click on

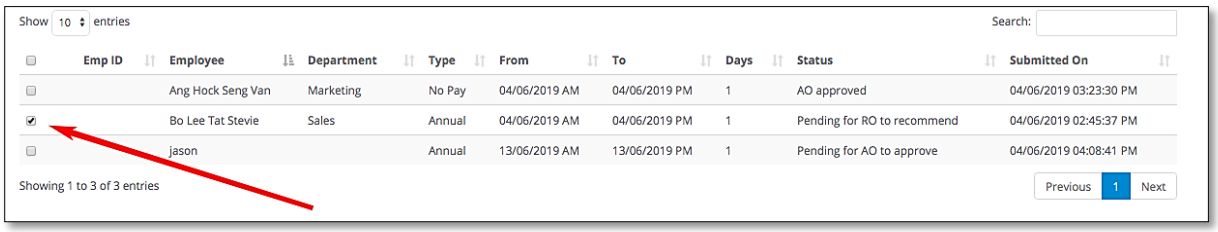
tab. You will see this page.

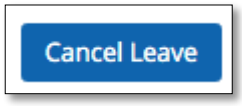


Step 4: By default, you will see the 

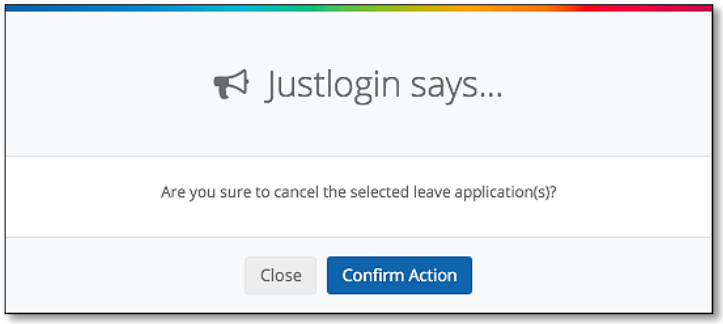
page.

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 

button below. The following message will appear

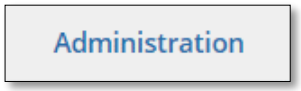


Step 7: Click on to proceed with the cancellation of leave.

Process Documents

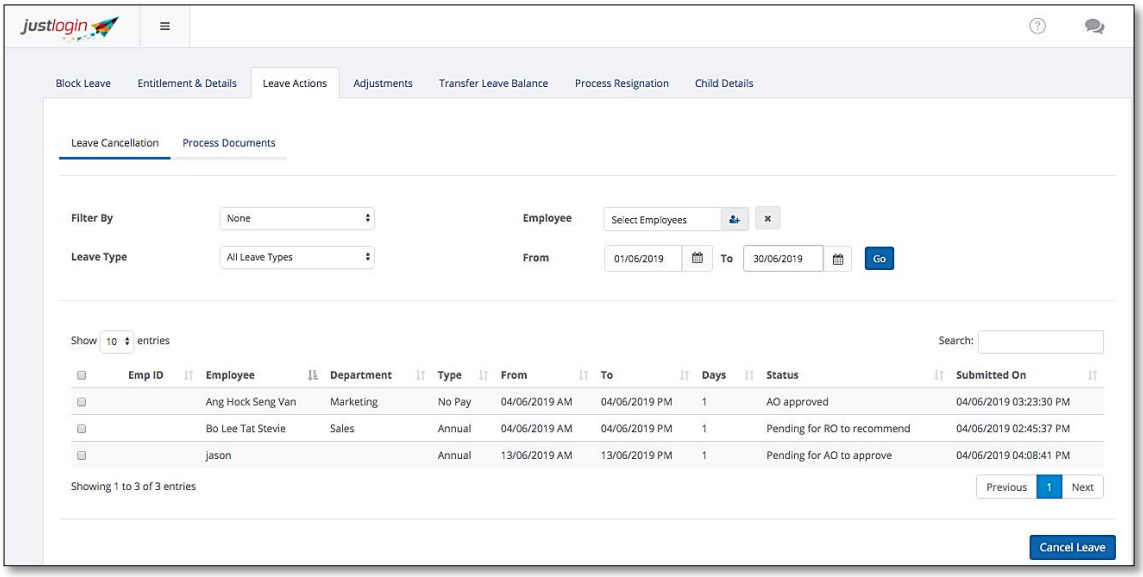
If you require your staff to submit hard-copy of documents when applying for certain leave types, the paper copies/hard-copies does not go through the system. The system will instead remind you through process documents page if you have received the hard copy of documents from the staff.

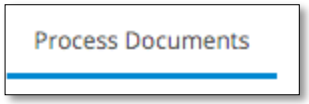
Step 1: Click on

Step 2: Click on 

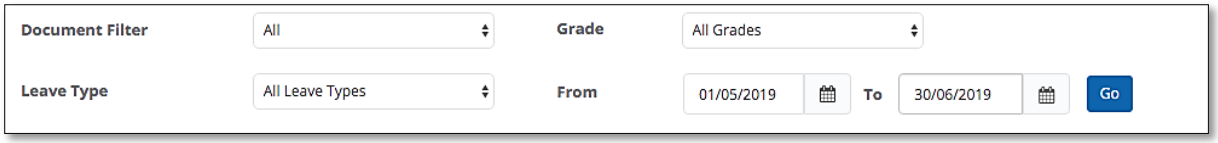
Step 3: Click on

tab. You will see this page.



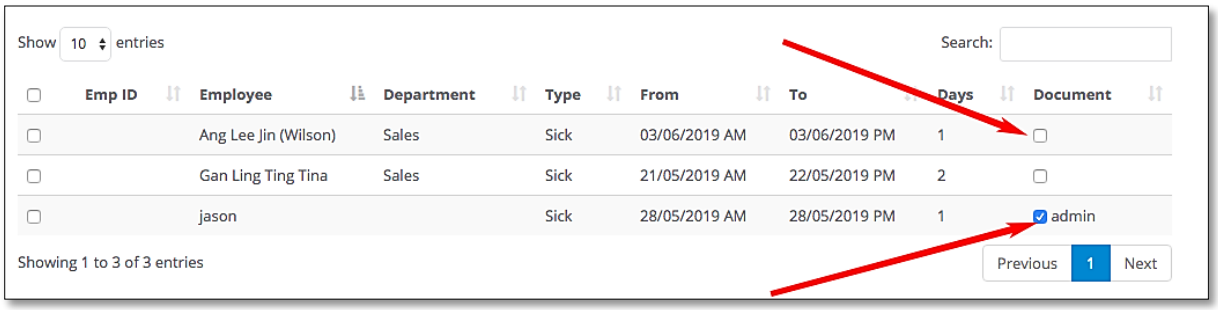
Step 4: Click on 

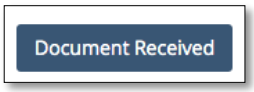
Step 5: (Optional) You can filter the documents through the different filters such as documents, leave types, grades and range of date.



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.



Step 8: When the administrator receives the hard copy document, the administrator can check the tickbox and click on the 

button.

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

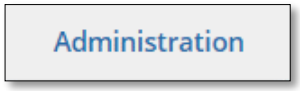
Adjustments

Adjusments

You can easily adjust (credit, debit or encash) the leave of your staff by using Adjustments. For example, staff worked on a Public Holiday and you will be giving the staff an additional leave, this can be done on Adjustments.

The steps are:

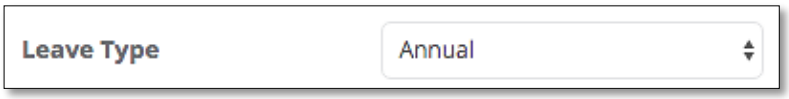
Step 1: Click on

Step 2: Click on 

Step 3: Click on

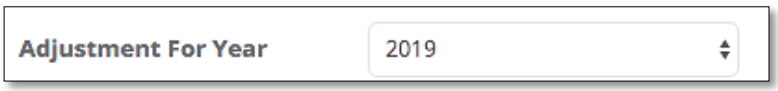
tab. This should bring you to the adjustments page

Step 4: Select the type of leave you wish to add, deduct or encash at

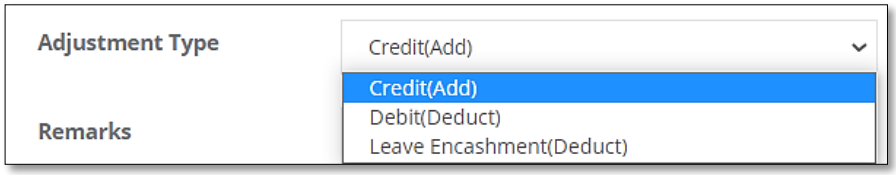


Step 5: Indicate the number of days you will be crediting, deducting or encashing

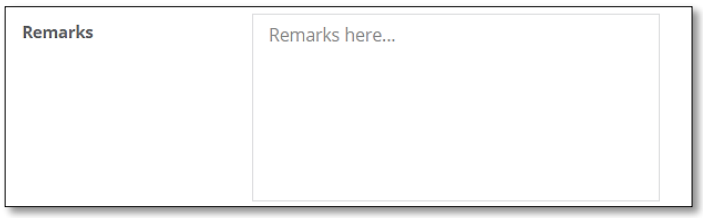
Step 6: Select the year of adjustment at



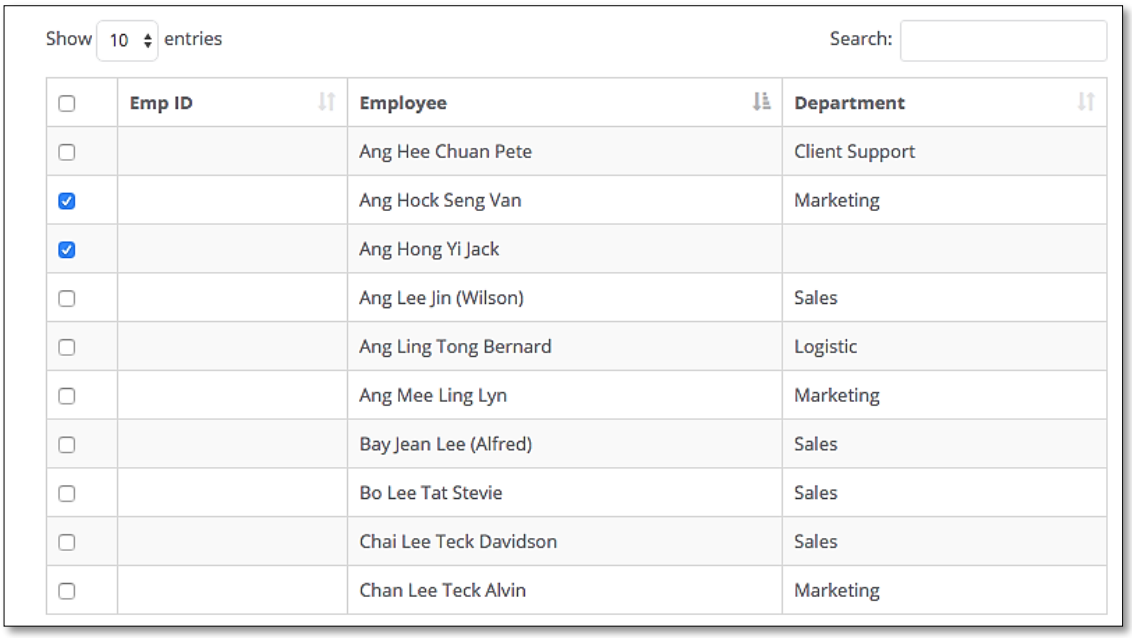
Step 7: Select Credit(Add), Debit (Deduct) or Leave Encashment (Deduct).

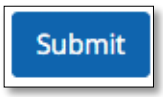


Step 8: (Recommended) Enter a remark why you did the adjustment at the Remarks field. Any remark input here can also be seen by the staff on their end.

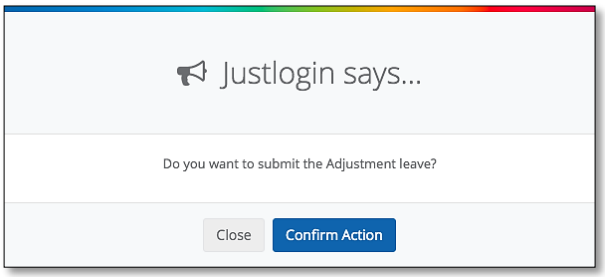


Step 9: Select the employees you wish to adjust the leave at



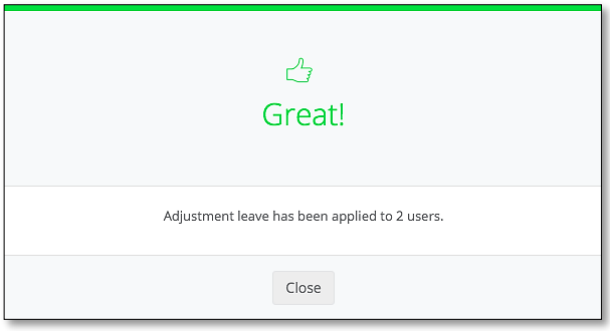
Step 10: Click on 

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



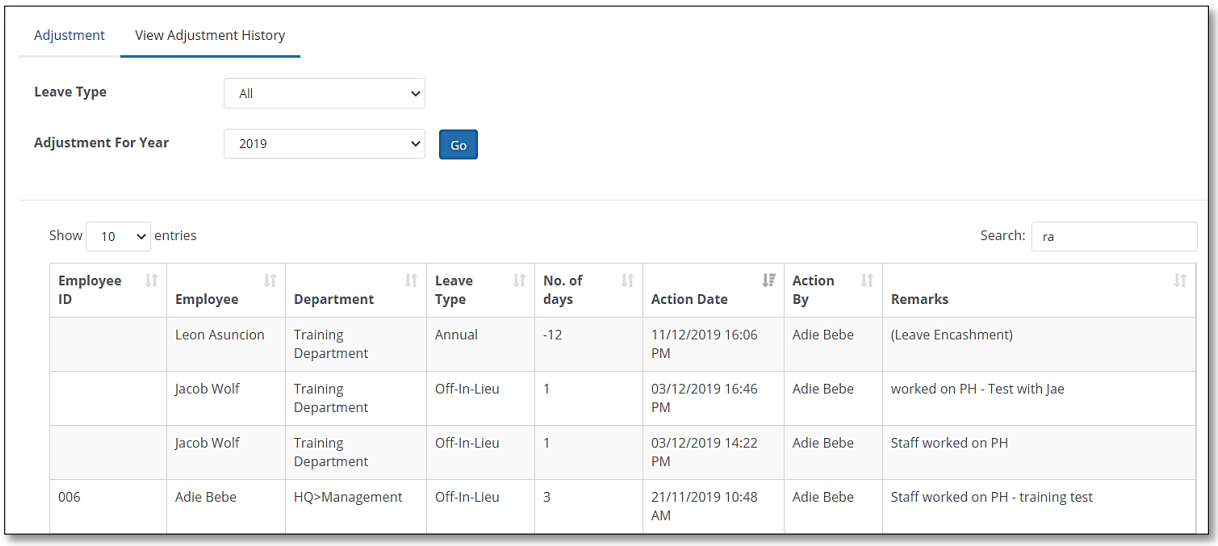
Step 12: Click on

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



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.

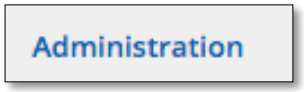


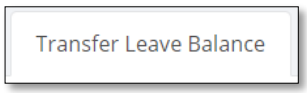
Employee ID	Employee	Department	Leave Type	No. of days	Action Date	Action By	Remarks
	Leon Asuncion	Training Department	Annual	-12	11/12/2019 16:06 PM	Adie Bebe	(Leave Encashment)
	Jacob Wolf	Training Department	Off-In-Lieu	1	03/12/2019 16:46 PM	Adie Bebe	worked on PH - Test with Jae
	Jacob Wolf	Training Department	Off-In-Lieu	1	03/12/2019 14:22 PM	Adie Bebe	Staff worked on PH
006	Adie Bebe	HQ>Management	Off-In-Lieu	3	21/11/2019 10:48 AM	Adie Bebe	Staff worked on PH - training test

Transfer Leave Balance

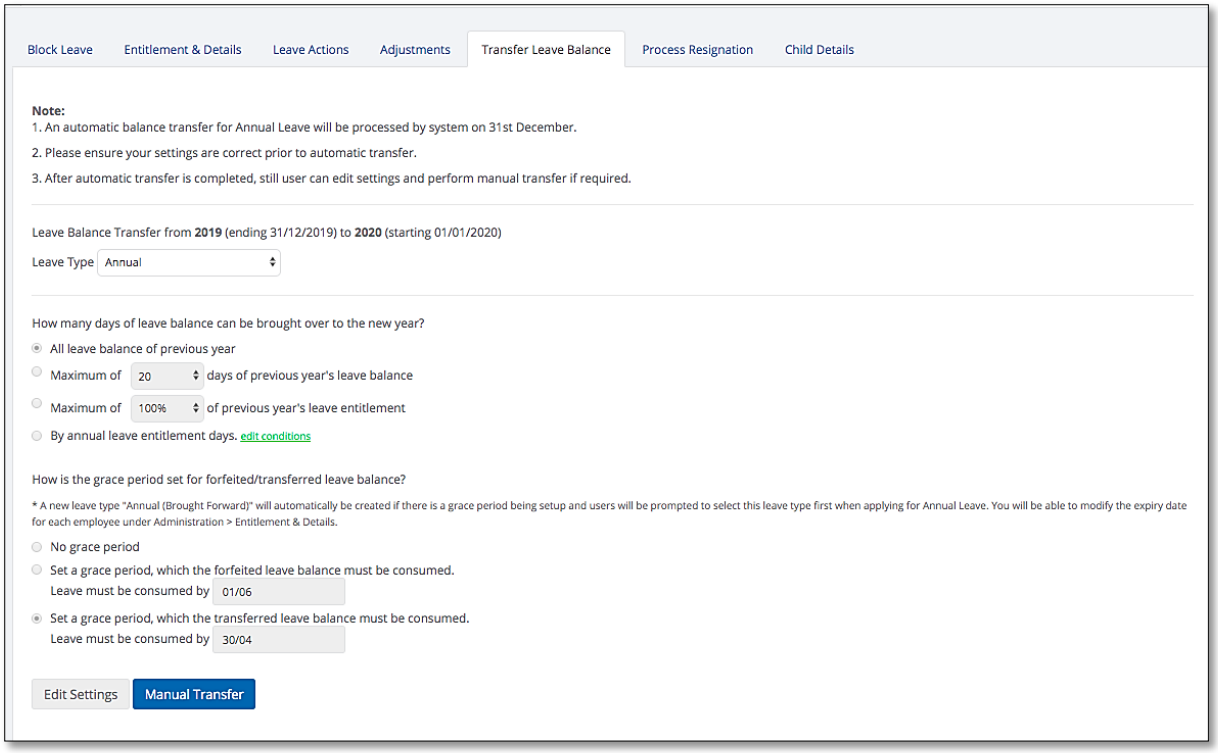
Automated Transfer Leave Balance removes the need of the leave administrator to manually do the Transfer Leave Balance of all the unused leave of last year to the new year.

The system will take whatever transfer leave balance setting from the previous year and will automatically apply that to the automated transfer.

Step 1: Click on 

Step 2: Click on 

The Transfer Leave Balance page will appear:



Note the following:

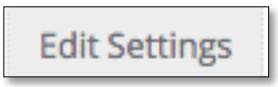
a. *The Automated Transfer Leave Balance will not happen automatically on the first time. You must do step 3 first then once you have saved it, the system will then automatically execute the transfer accordingly. The transfer will be based on the settings configured on this page.*

b. *The system will use the previous year's setting for the transfer*.

c. *The transfer will automatically happen on the 31st of December.*

d. *Only Annual Leave will be transferred through this method.*

e. *If manual transfer has been done before 31st of December, automated transfer will not occur in the account.*

Step 3: You must for setup the parameters of the transfer. You can do so by clicking on the 

button. Subsequently, if you wish to modify the setting the next time, you can still click on the “Edit Settings” button.

Step 4: On the 1st portion, this is referring to the number of days that can be brought forward. There are 4 options to choose from, just choose one:

Option 1 - *All leave balance of the previous year* - the system will transfer any remaining balance of the leave type chosen over to the following year.

Option 2 - *Maximum of __ days of previous year's leave balance* - the admin can set a specific number of days that can be transferred into the following year

Example:

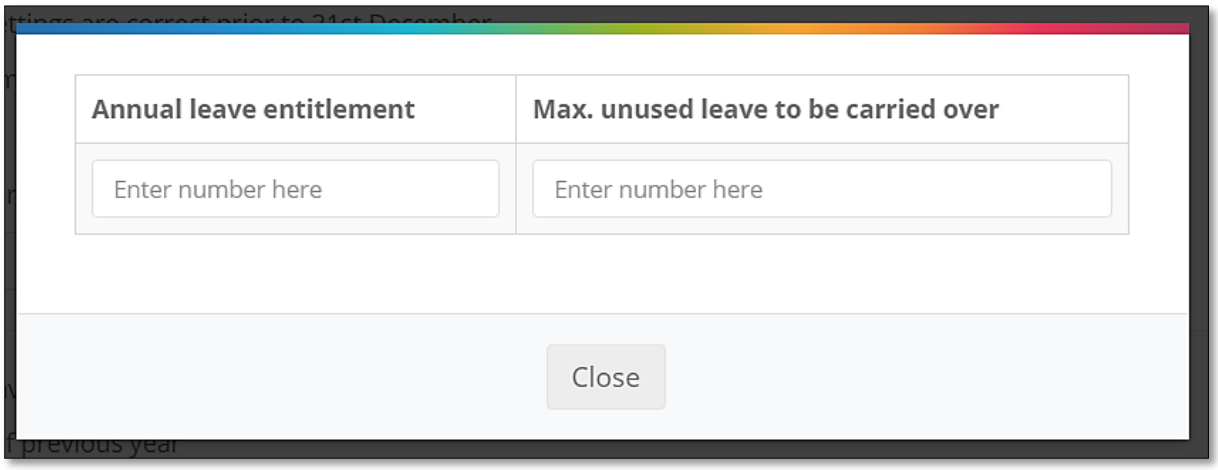
If the remaining balance for Annual 2020 is 15 days, and the company only allows up to 5 days to be transferred to 2021 for all users, then he must choose 5 on the dropdown field.

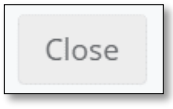
Option 3 - *Maximum of __% of previous year's leave entitlement* - the system will only transfer a certain percentage of last year's total entitlement.

Example:

If one of the employees' entitlement is 18 days for Annual 2020 and can transfer only up to 50% of the entitlement, the remaining balance for Annual 2020 is 10, then the system will only carry over 9 days.

Option 4 - *By annual leave entitlement days* - is almost the same as the second option, only that it is based on the Annual 2020 entitlement instead of just the remaining balance. The admin needs to click on the "edit conditions" link to set the policy in the pop-up window



Input the annual leave entitlement value and the number of leaves that can be brought over for each leave entitlement. After doing so, click on 

Step 5: On the 2nd portion, this is where you can set the "grace period" for the transferred leaves if any. There are 3 options to choose from, please choose one:

Option 1 - *No Grace Period* - means that the transferred balance has no expiry date and whatever is left from the previous year will be added to the staff's Annual Leave opening balance of the following year.

Example:

2020 remaining balance: 5

No grace period
2021 entitlement: 18

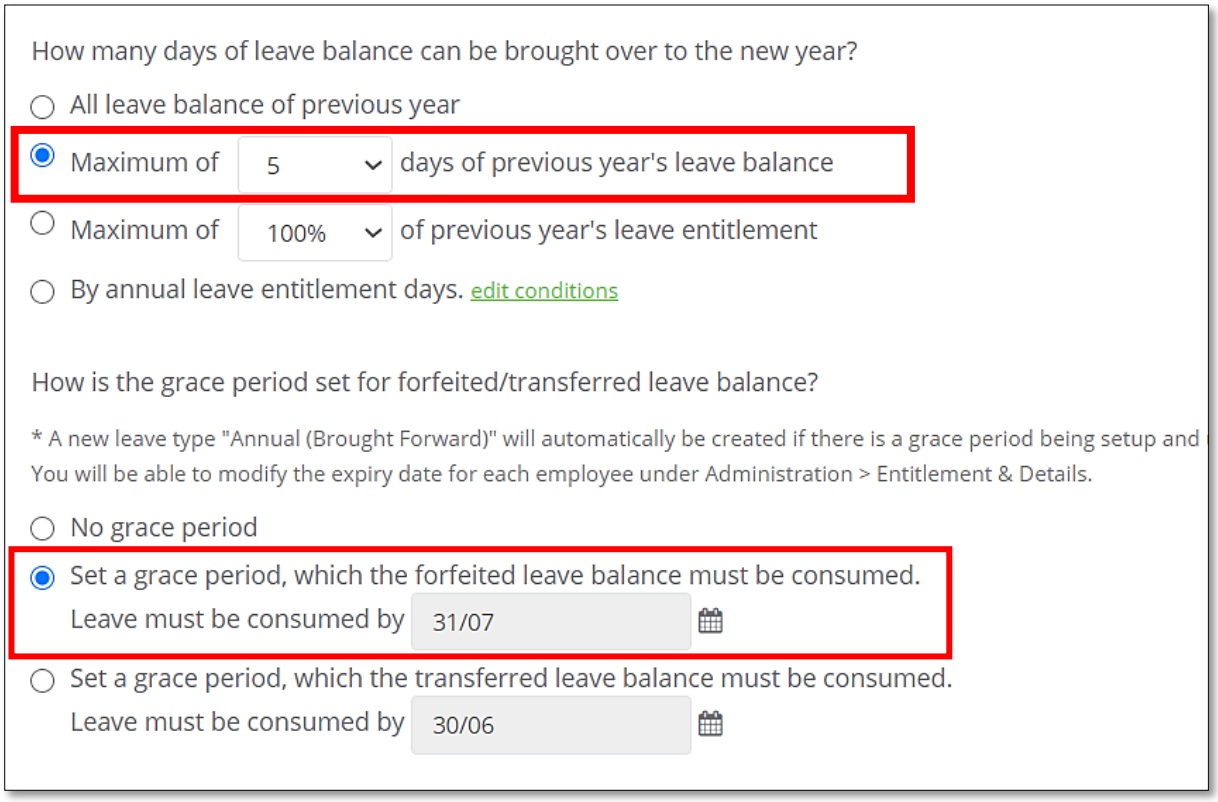
Then:

Opening balance (if entitlement policy): 23 (18+5)

Opening balance (if earned policy): 5 (0+5)

Option 2 - *Set a grace period, which the forfeited leave balance must be consumed - Leave must be consumed by* – this option allows the admin to set an expiry date for any un-transferred balance from the previous year and will create another leave type called "**Annual Brought Forward**" to show the un-transferred balance. This leave type can then be used by the employee to apply for leave before the set expiry date.

Example:



Remaining balance from 2020: 11

No. of days allowed to be transferred: 5

Forfeited leave: 6

Then:

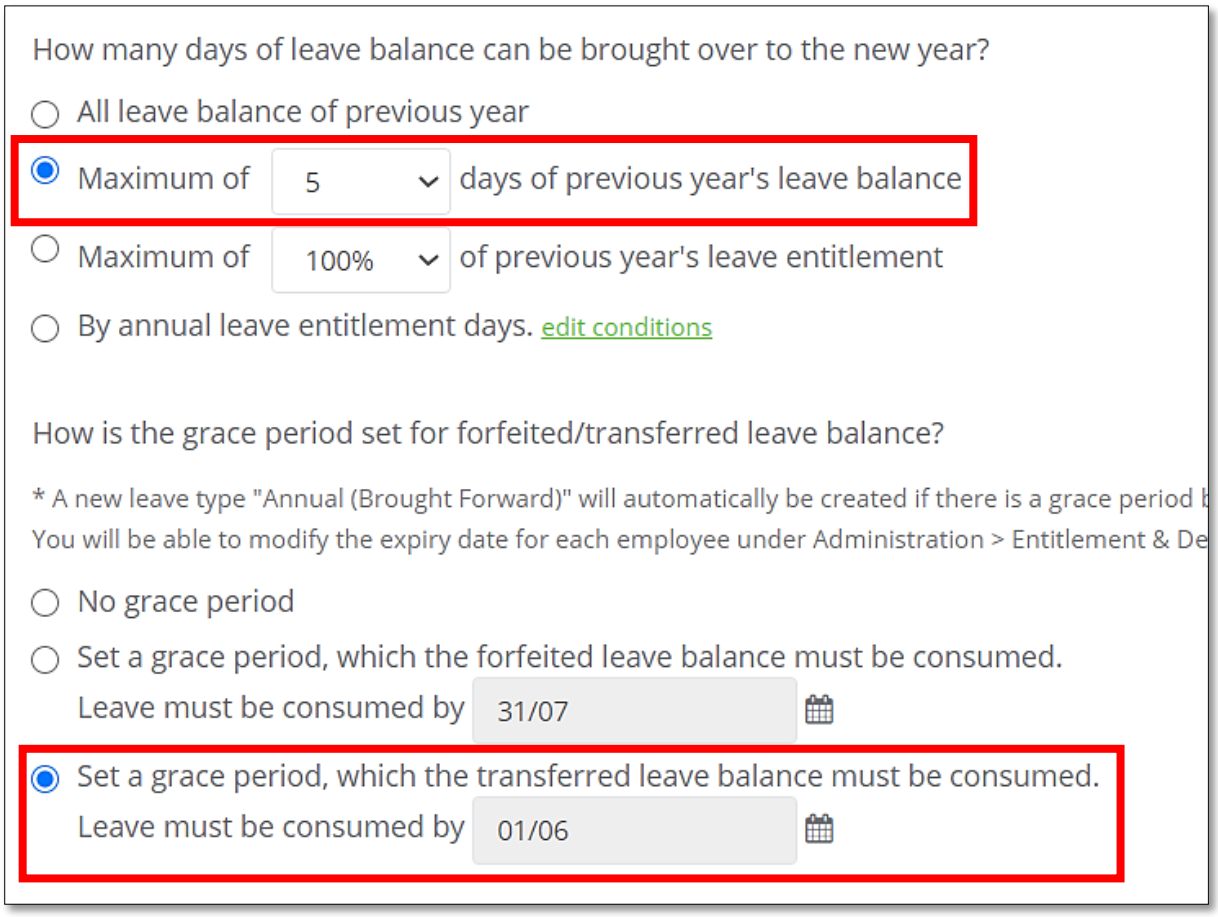
Opening balance for 2021 (if entitlement policy): Entitlement + 5

Opening balance for 2021 (if earned policy): 5 (0+5)

Annual Brought Forward opening balance: 6 (this is to be consumed on or before 31st of July.

Option 3 - *Set a grace period, which the transferred leave balance must be consumed - Leave must be consumed by* - this allows the admin to set an expiry date for the transferred leave balance to the following year. Whatever leave transferred will then be shown through an automatic leave type created called “Annual Brought Forward".

Example:



Remaining balance from 2020: 11

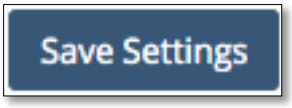
No. of days allowed to be transferred: 5

Then:

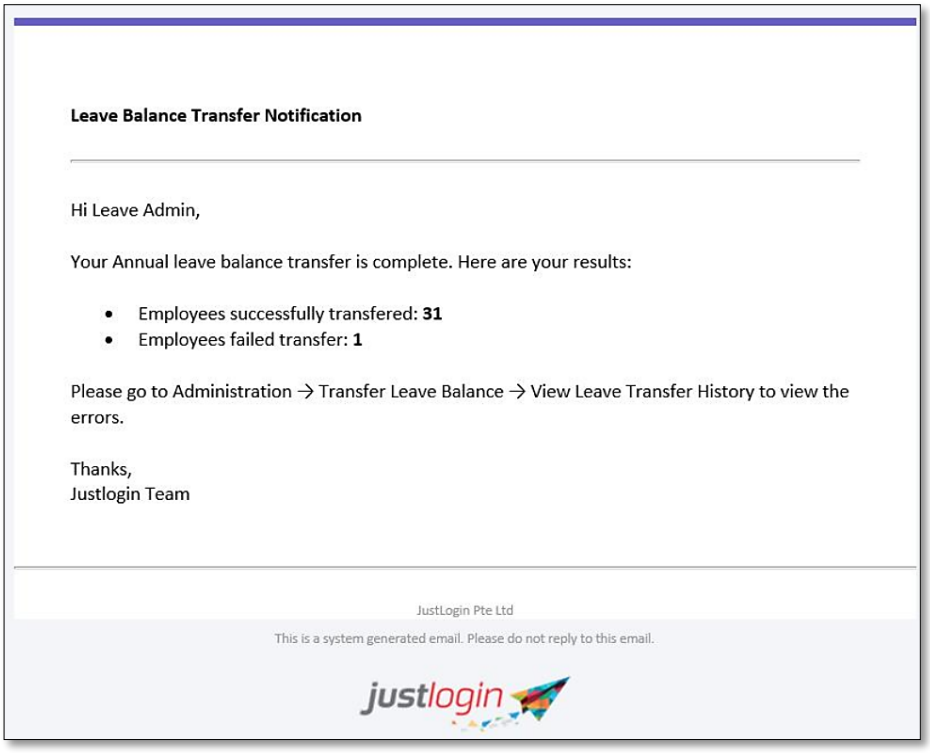
Opening balance for 2021 (if entitlement policy): Entitlement

Opening balance for 2021 (if earned policy): 0

Annual Brought Forward opening balance: 5 (this is to be consumed on or before the 1st of June 2021.

Step 6: Once complete, click on 

Step 7: Once the transfer has completed, a notification will be sent to the leave administrator regarding the transfer. If there are any failure you can see this at the **View Leave Transfer History**



Leave Balance Transfer Notification

Hi Leave Admin,

Your Annual leave balance transfer is complete. Here are your results:

- Employees successfully transfered: **31**
- Employees failed transfer: **1**

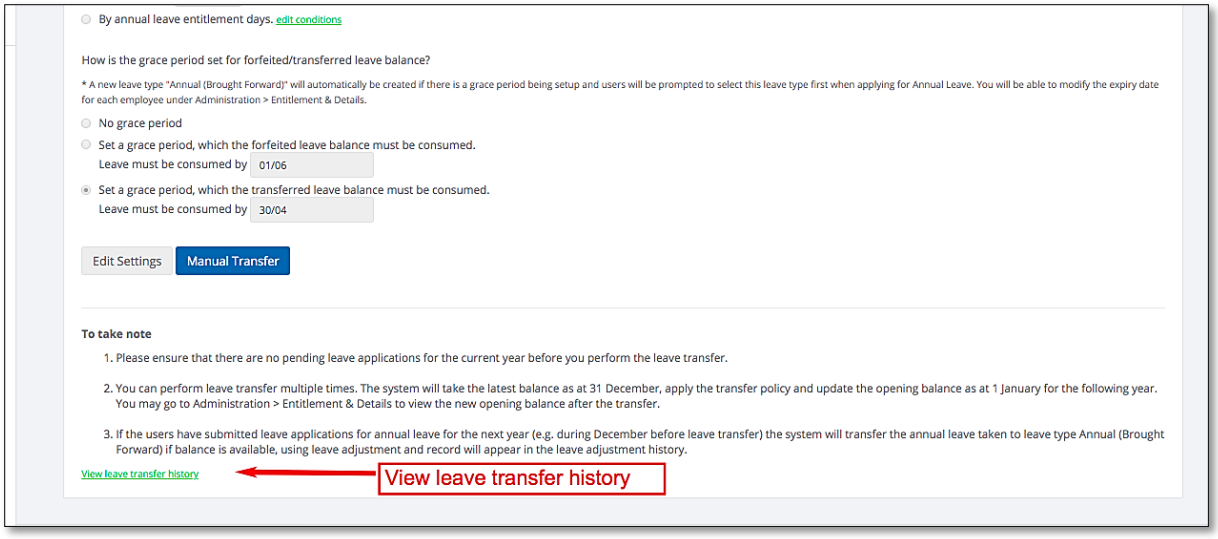
Please go to Administration → Transfer Leave Balance → View Leave Transfer History to view the errors.

Thanks,
Justlogin Team

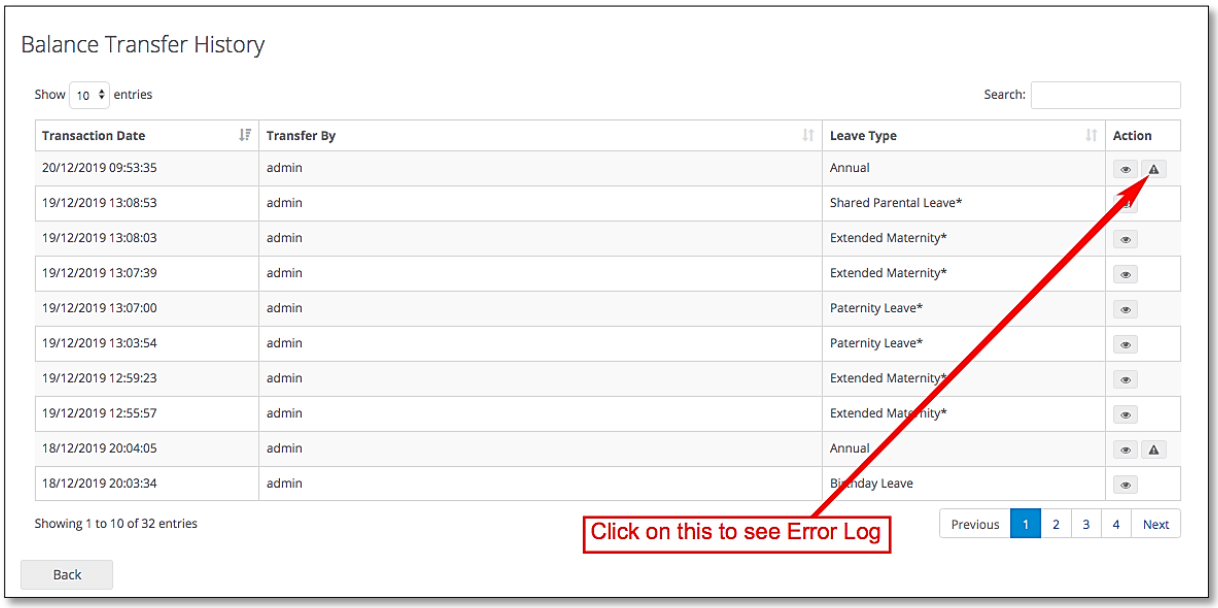
JustLogin Pte Ltd

This is a system generated email. Please do not reply to this email.

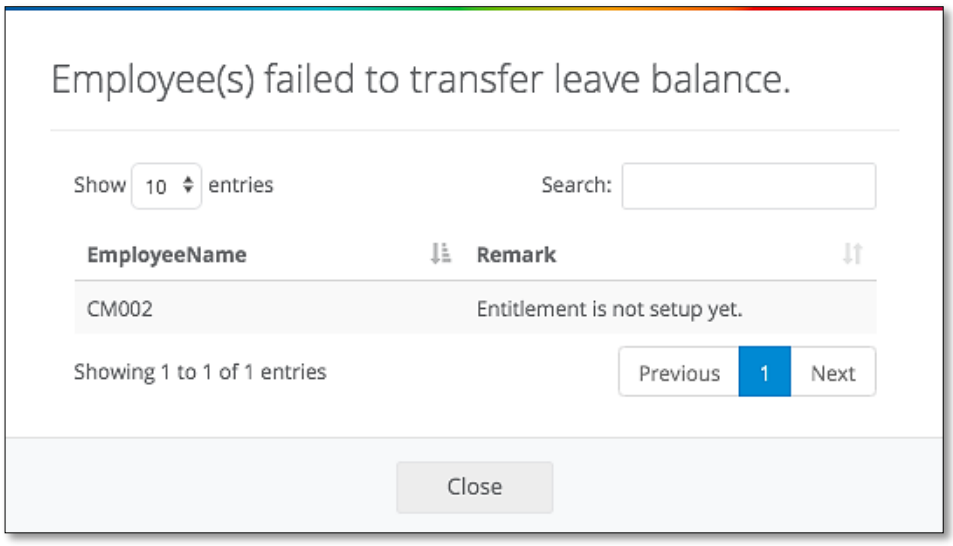
Step 8: Click on the **View leave transfer history** as shown. This is found at the bottom of the page.



Step 7: The Balance Transfer History page will appear. If there are any errors, you may click on the Error log to see.



Step 8: The error log will show you which user you are having issues with, and the reason why the transfer failed.



Some of the common errors that can result in the failure of the transfer are:

1. **Entitlement is not set**. Go to the **Entitlement & Detail** page and make the required amendment.

2. **Leave grade is not set**. Go to the **Entitlement & Detail** page and assign the correct grade to the staff

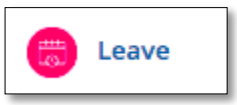
Step 9: Once the errors has been fixed, you can redo the transfer by clicking on the

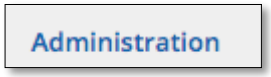
button

Process Resignation

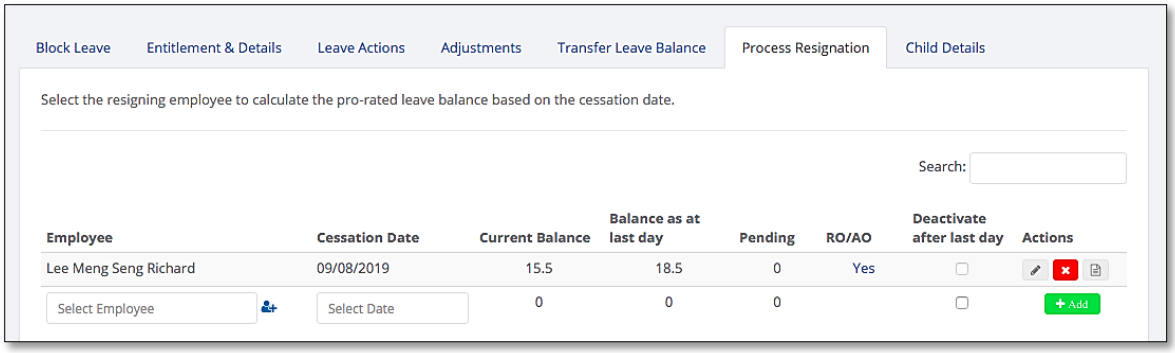
The Process Resignation is useful especially if you are using earned leave to help you project the leave balance of a staff who is intending to resign.

The Process Resignation steps are:

Step 1: Click on 

Step 2: Click on 

Step 3: Click on



Step 4: Click on to select the employee name

Step 5: Enter the Cessation Date

Step 6: Click on

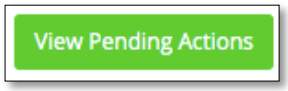
Notes:

a. The balance as at the last day value is a combination of the prorated leave balance of the staff as of the cessation date PLUS any unused leaves brought forward
b. If there are any leave applications from the staff who is resigning, there will be a number displayed under the “Pending” column.
c. If the staff who is resigning is an Approving Officer or Recommending Officer, “YES” will appear under the RO/AO column. You can click on “Yes” to see the list of the staff assigned to the resigning AO/RO and re-assign those in the list to another AO/RO

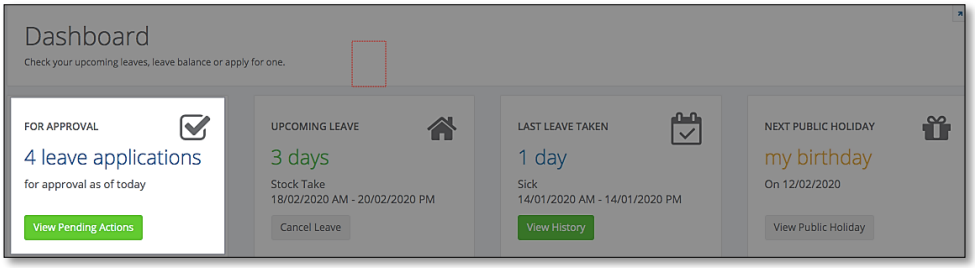
Approval

Pending Actions

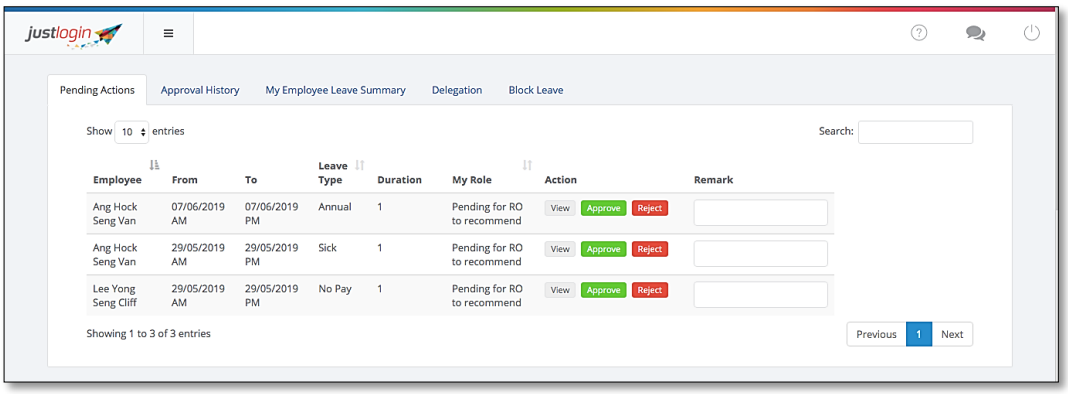
Anyone that is being appointed as the Recommending Officer or Approving Officer will have access and see the Approval section on the Leave Dashboard when the staff under them applies for leave.

Step 1: Click on 

at Dashboard.



The following page will appear.



Step 3: Click on

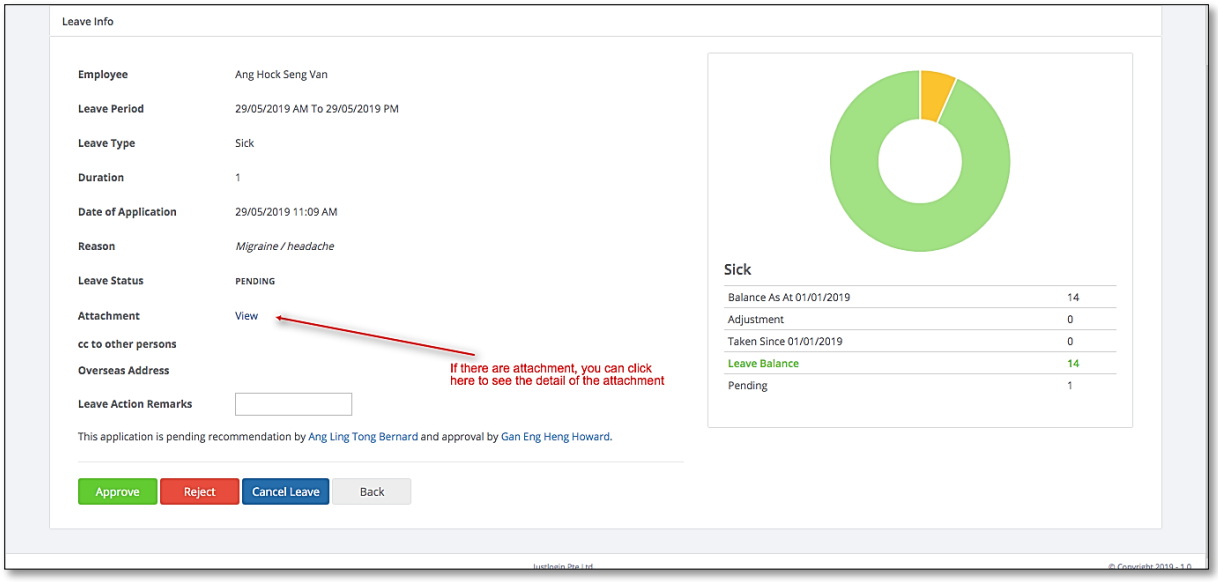
to view the leave detail as well as any attachments. Click on

to approve the leave or click on the

to reject the leave.

Step 4:If click on

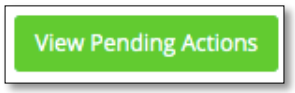
, you will see the page below:



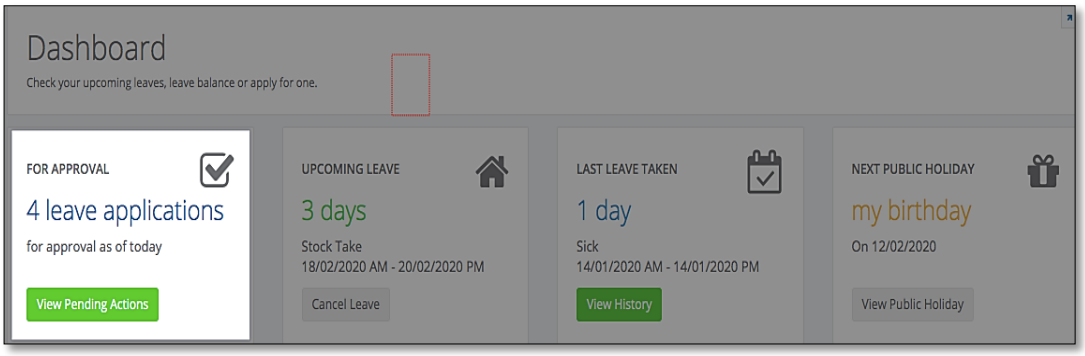
Step 5: After viewing you can then decide to approve or reject or cancel the leave in this page.

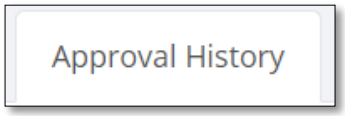
Approval History

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.

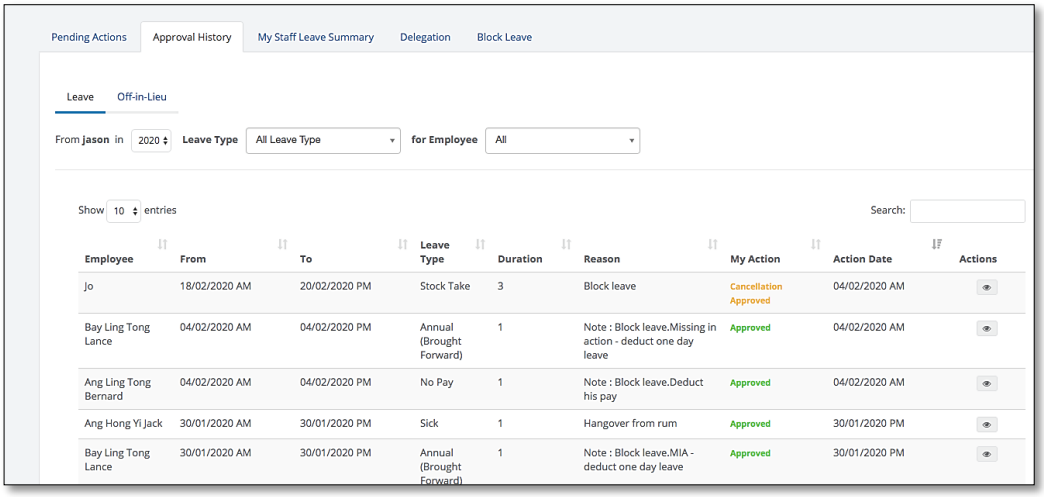
Step 1: Click on 

at Dashboard.

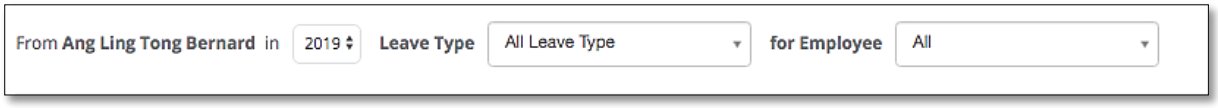


Step 2: Click on 

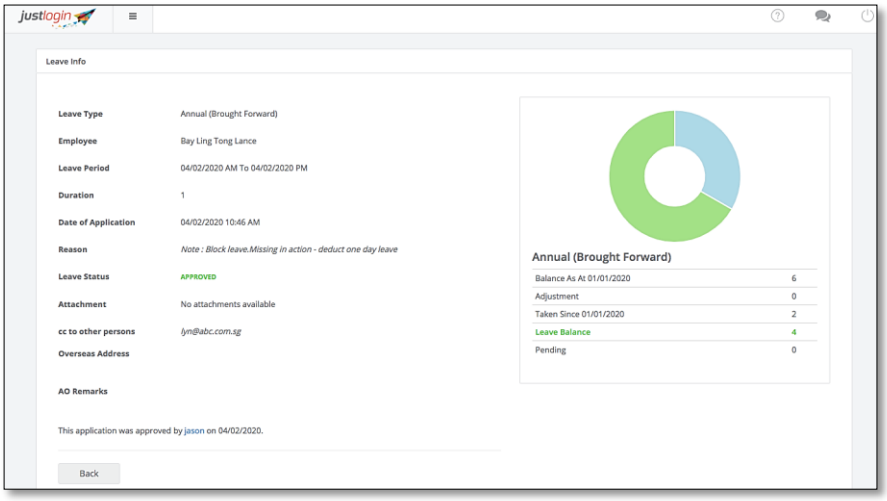
You should see this page

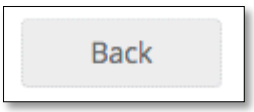


Step 3: (optional) You can filter the leave according to leave type and/or employees



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



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

Step 6: Click on to cancel leave. Note that this depends on whether the rights to cancel the leave has been given by the leave administrator to approving officers or recommending officers.

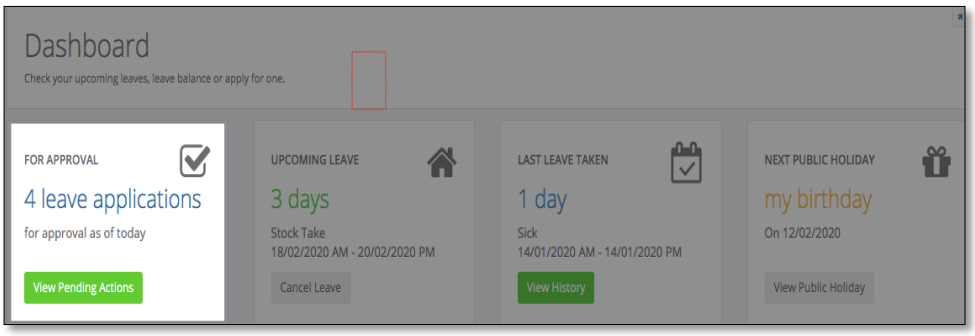
My Staff Leave Summary

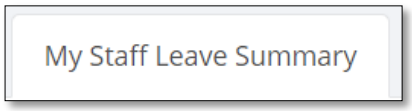
This page allows the RO/AO to view the leave balance of the staff they are in charge of.

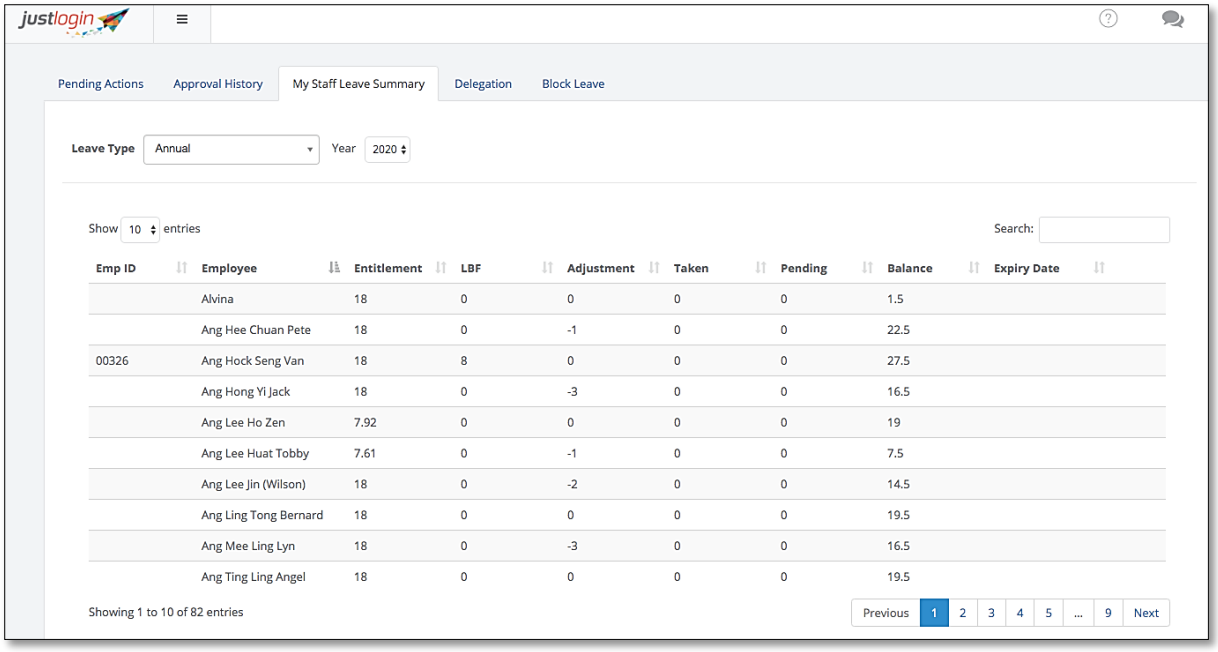
To see this page, follow these steps:

Step 1: Click on

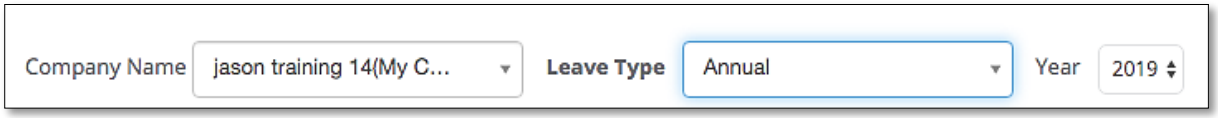
at Dashboard.



Step 2: Click on 



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

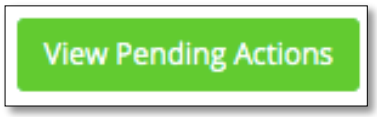


Delegation

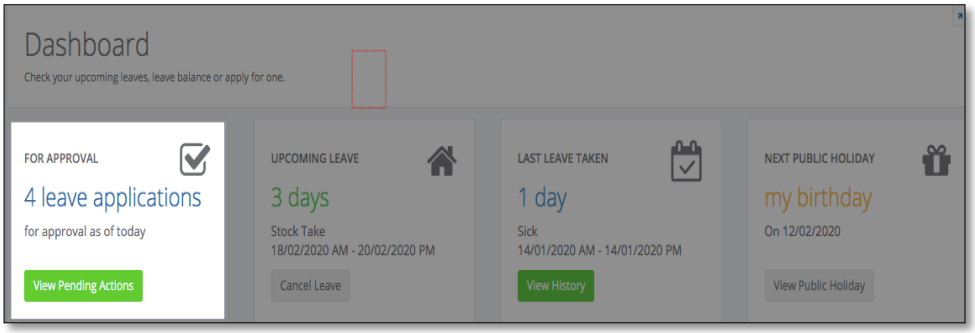
The RO/AO will have the ability to delegate the approving process to another staff if they are going on leave for a certain period of time.

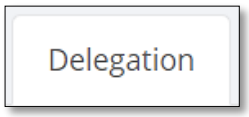
To do that, follow these steps:

Step 1: Click on

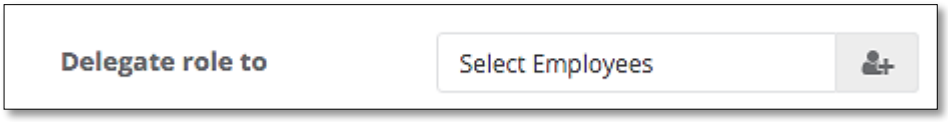
Step 2: Click on 

from the Dashboard

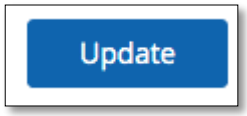


Step 3: Click on 

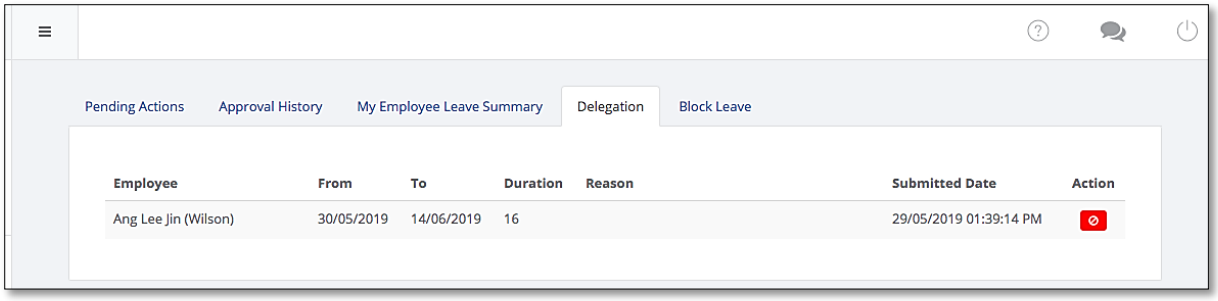
Step 4: Select the staff you wish to delegate the approving rights to at



Step 5: Select the duration of the delegation

Step 6: Click on the 

button to save



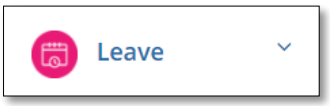
Step 7: You can cancel the delegation before the stipulated end date by clicking on the icon

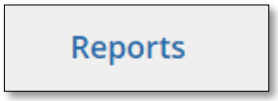
Reports

Leave Query

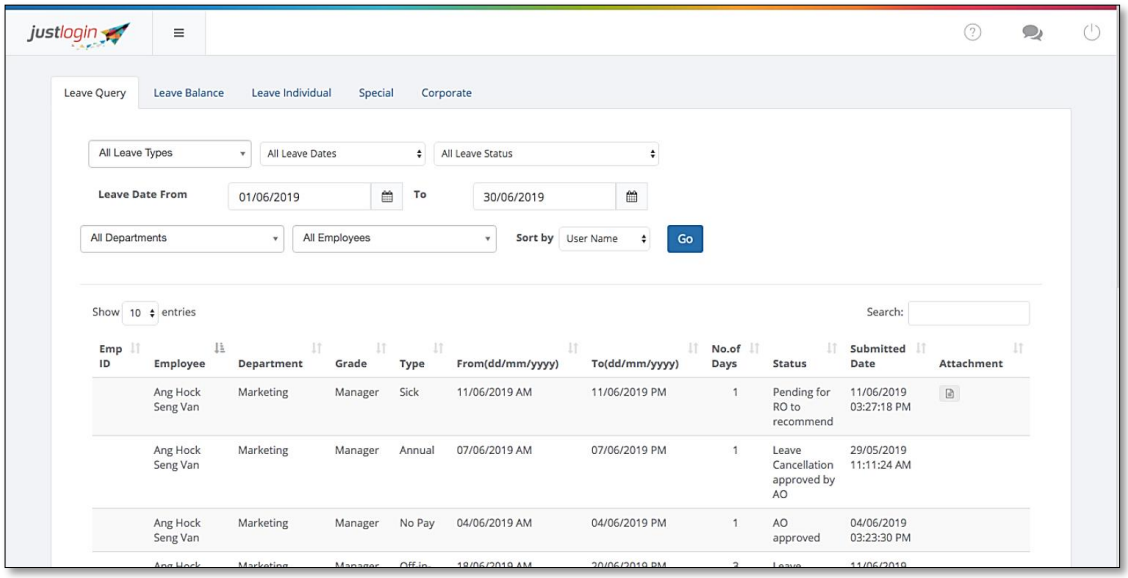
You can use Leave Query report to know the status of the leave application of the staff in your system, check on the dates of submission as well as view the attachments

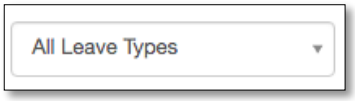
The steps are:

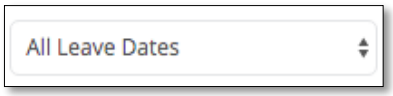
Step 1: Click on 

Step 2: Click on 

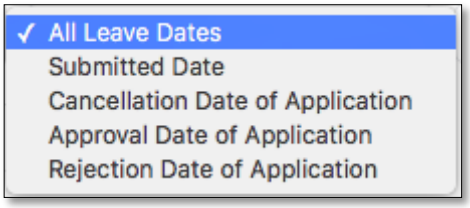
The default page that you should see will be the Leave Query page.

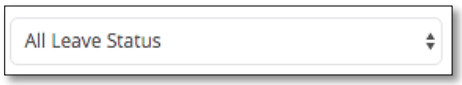


Step 3: (Optional) You can query by the leave types 

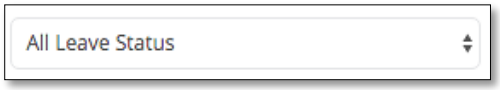
Step 4: (Optional) You can also filter by 

. Click on the scroll down arrow you can filter by



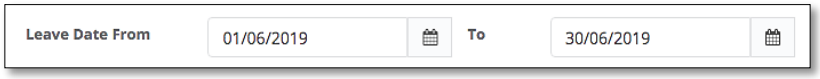
Step 5: (Optional) Another filter you can use to sort the data is the 

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

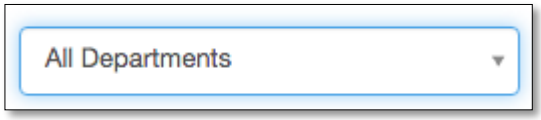
Step 6: (Optional) Another filter you can use to sort the data is the 

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

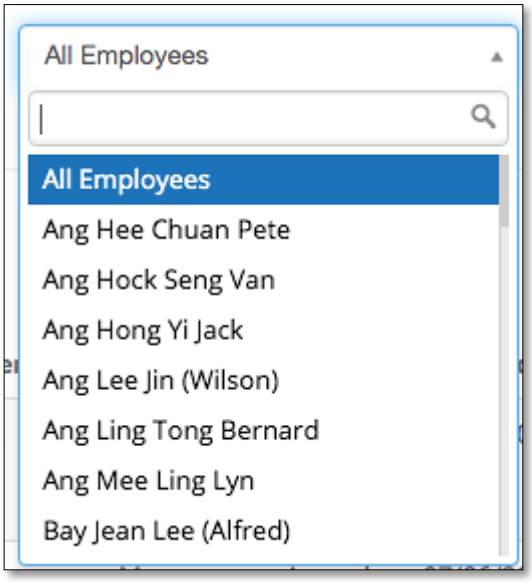
Step 7: Enter the date you wish to query at



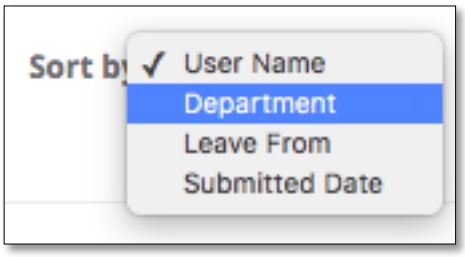
.

Step 7: (Optional) You can also filter by 

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:

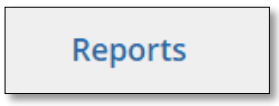


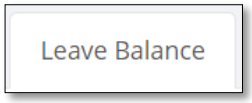
Step 10: Click on to start the query.

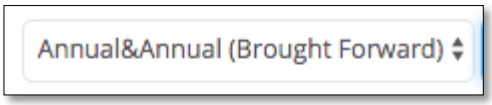
Leave Balance

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

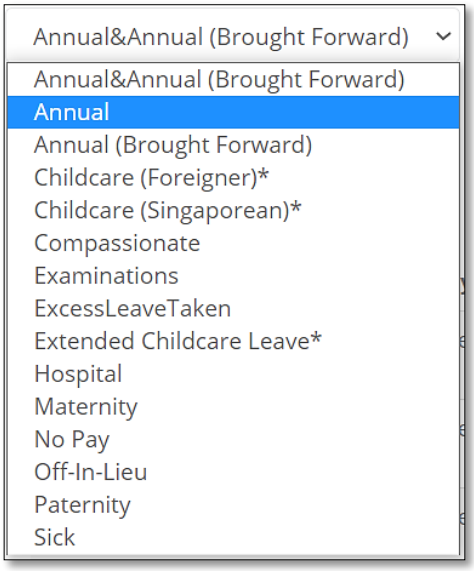
Step 1: Click on

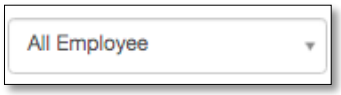
Step 2: Click on 

Step 3: Click on 

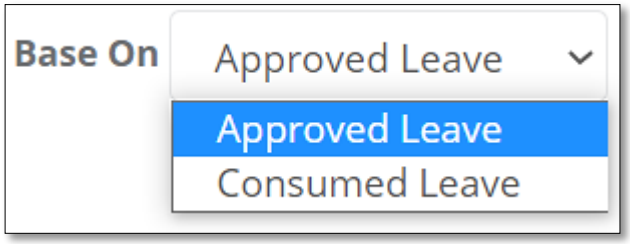
Step 4: Select the type of leave you wish to check 

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



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

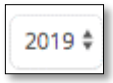
Step 6: Then select the basis of the report if based on either approved leave or consumed leave



NOTE:

- Use Consumed Leave if you are on an Earned Leave Policy. This option will allow you to indicate a specific period for the basis of the current balance of the staff. Consumed Leave can also be used if you want to know the prorated balance of the staff who is leaving the company.

- Use Approved Leave if you are on an Entitlement Leave Policy. The balance displayed for this report will be based on the whole years' entitlement of the staff.

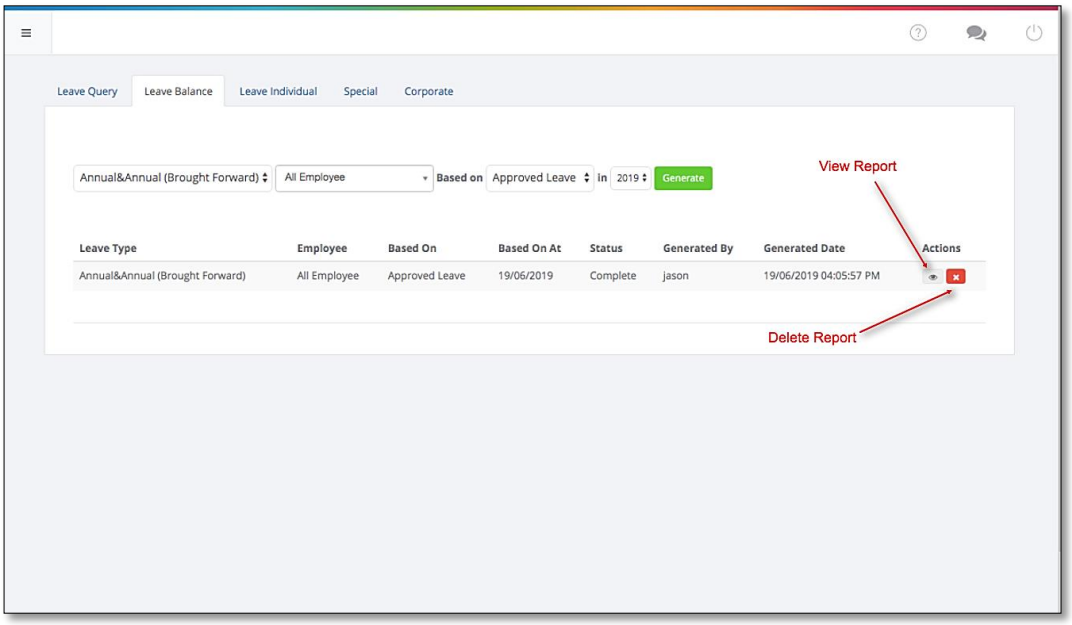
Step 7: (Optional) You can select the year of the query at 

. By default, the system will set the current year as the year.

Step 8: To start the generation of the leave balance, click on the

button and the system will generate the report.

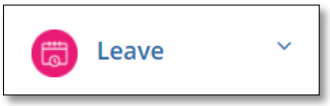
Step 9: Once the system complete the generation of the report, a row will appear. Click the View to see report or the delete icon to delete the report.

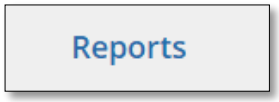


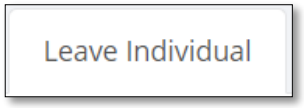
Leave Individual

The Leave Individual report allows you to view all the leave types and leave balances of the staff.

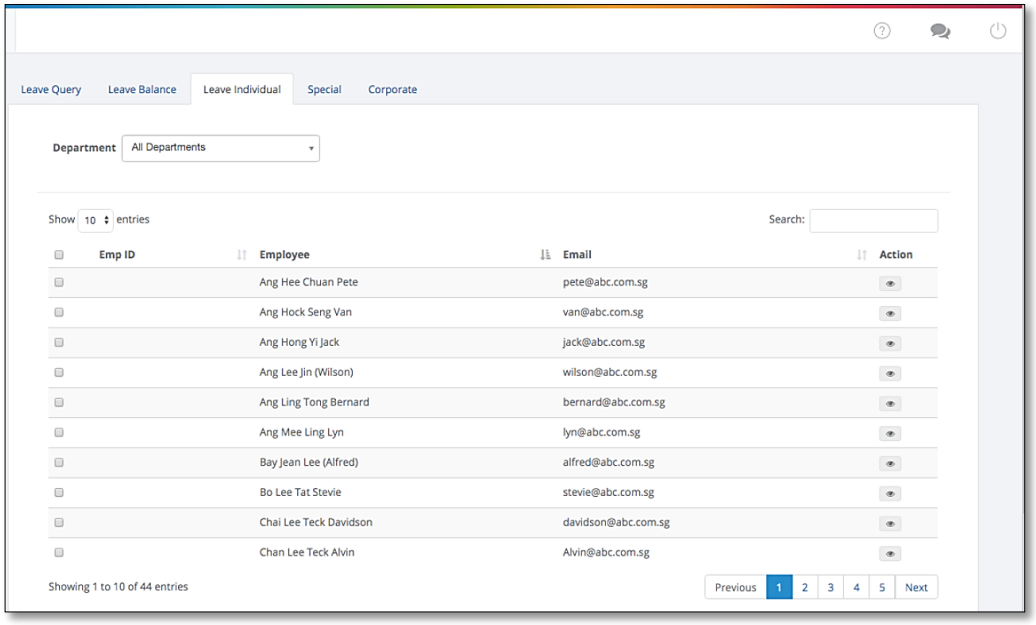
To see that, you need to do the following:

Step 1: Click on 

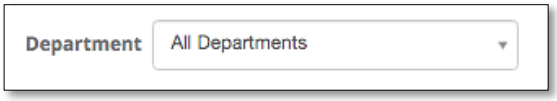
Step 2: Click on 

Step 3: Click on the 

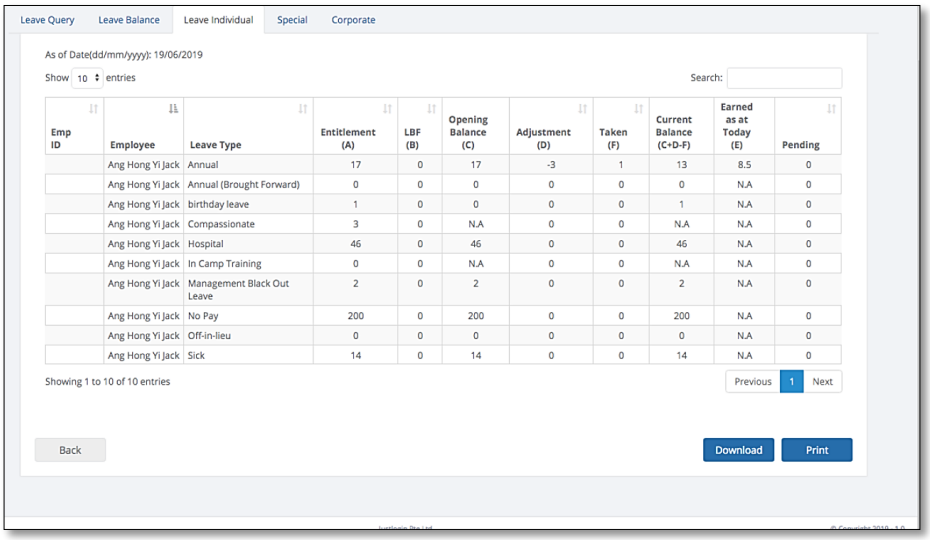
tab. You should see this page.



Step 4: (Optional) You can filter the list by selecting a department at the



Step 5: Find the staff you want to check out and click on the icon and the following table comprising all the entitled leave for this staff will appear in the following format.



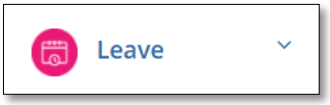
Step 6: (Optional) You can download or print the individual leave report by clicking the relevant

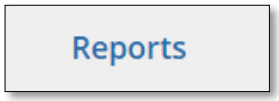
buttons.

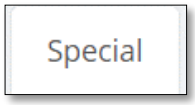
Special

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.

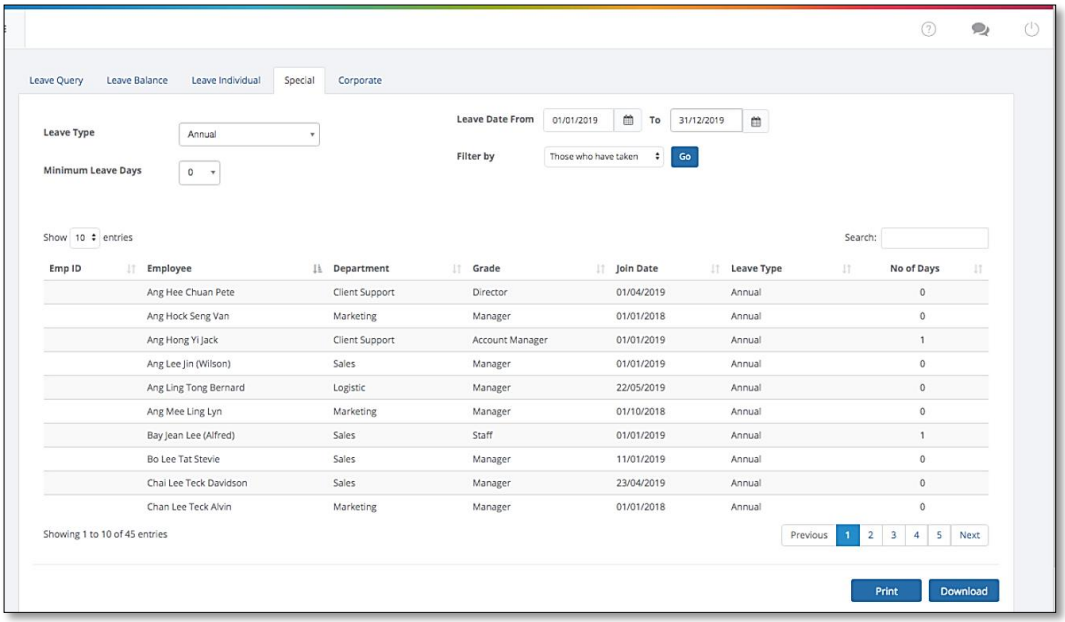
To use this report, follow these steps:

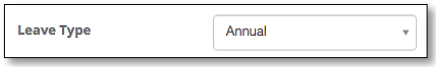
Step 1: Click on 

Step 2: Click on 

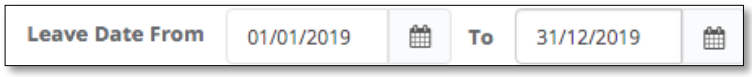
Step 3: Click on 

The following page will appear.



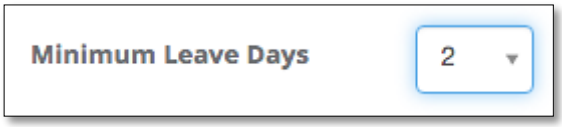
Step 4: Select the leave type you are looking for at the 

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

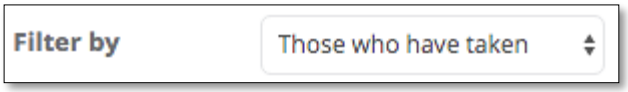


The default will be from the first day of the year to the end of the year.

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



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



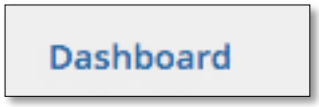
Step 8: Click on the

to start the query.

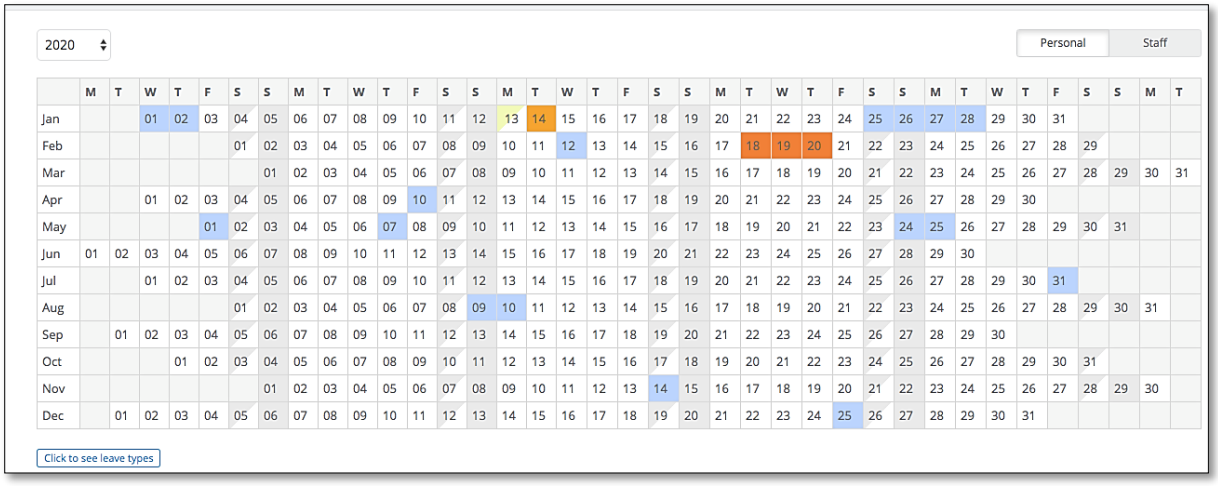
Personal Calendar

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

Step 1: Click on

Step 2: Click on 

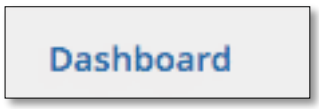
Scroll down and you should see the calendar. By default, the system will show the staff their own personal calendar.



Staff Calendar

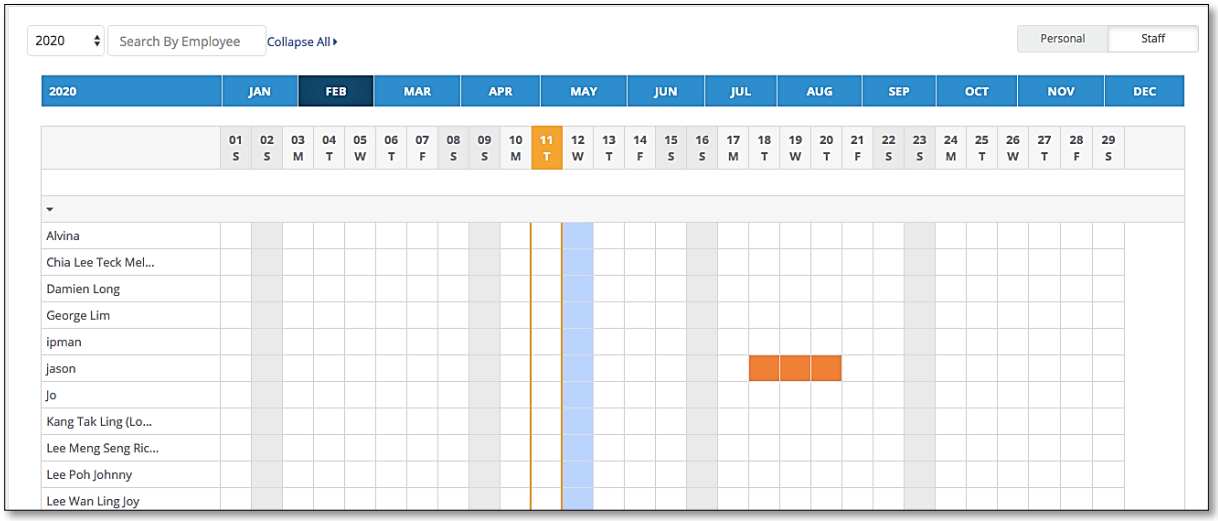
If the administrator sets the calendar to be shared with either within the department or the entire company, then the Staff Calendar option will be available. To view the staff calendar, please follow these steps:

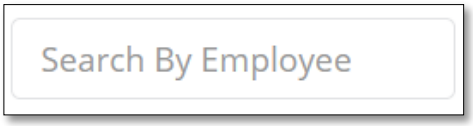
Step 1: Click on

Step 2: Click on 

. Scroll down and you should see the calendar.

Step 3: Click on



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.