HongKong Leave Configuration Guide

Introduction

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

Configuration

Company Settings

Section 1: Company Policy

The Company Policy allows you to set up the work week and the company's Leave Policy .

Working Week

The first portion is the Working Week. You will need to define the working weeks of your company. This is important as this will determine when the staff can take leave as well as used by the system to calculate the proration of leaves.
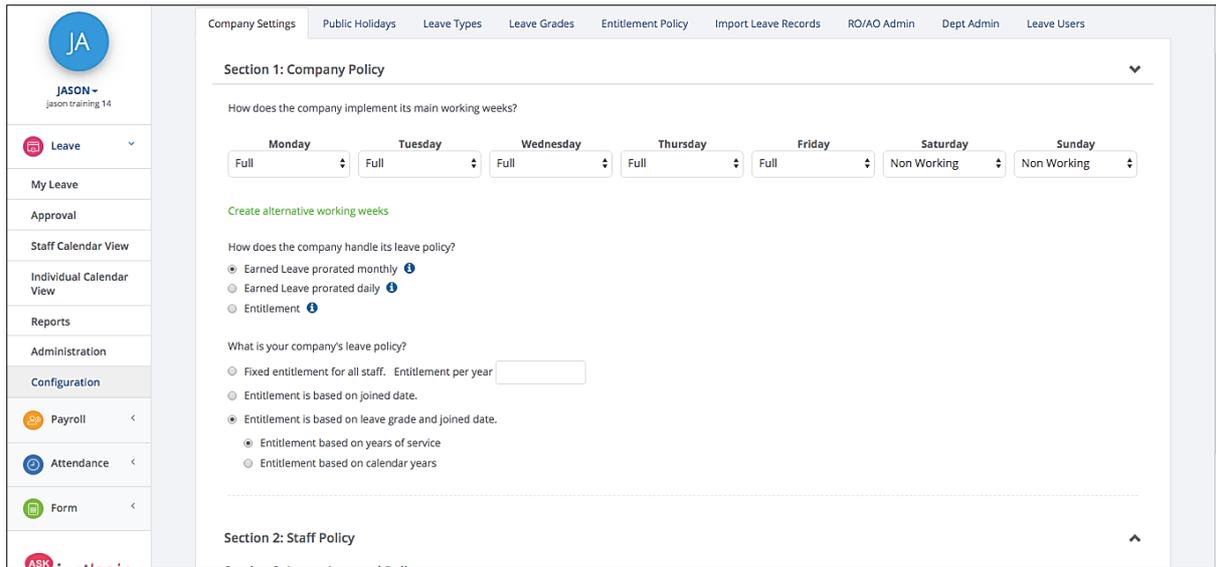
Step 1: Click on

Step 2: Click on

Step 3: Click on . You should see this screen

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

Step 5: If you have more than 1 working week configuration, you can click on

You can define up to 10 alternate working weeks.

Handling Leave Policy

There are 3 leave policies you can choose from. You need to select one option.

***Earned Leave prorated* monthly** - staff would need to earn their leave on a monthly basis.

Earned Leave prorated daily - staff would need to earn their leave on a daily basis.

Entitlement - leave is given to the staff immediately when they join either on full or prorated.

If you chose Entitlement, you could set whether pro-ration is daily proration or monthly proration.

Company Leave Policy

After you have chosen how the Leave system handles the leave policy, we need to set up the company leave policy.

There are three options in which you can chose from

Fixed entitlement for all staff. The number of leave will remain the same regardless of how many years the staff has joined the company.

Entitlement based on years of service. The number of leave will change depending on the years the staff has joined the company. You can set the increment to be based on the anniversary or based on calendar years.

**If you have selected this option, you may wish to refer to page 17 to 18 on how to configure the entitlement based on joined date.

Entitlement based on leave grade and joined date. The number of leave will be based on the staff grade and the date they joined the company. You can set the leave increment based on the grade and the joined date.

**If you have selected this option, you may wish to refer to page 17 on how to configure the entitlement based on leave grade and joined date.

Section 2: Staff Policy

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

Step 1: Click on

Step 2: Click on

Step 3: Click on

Step 4: Click on

Step 5: Set the probation period before the staff can take Annual leave at

Does the company require staff to fulfill minimum month(s) of service before they can apply for Annual leave?
- ⦿ Yes
  - After [3 ⬍] months of service
- ◯ No

Step 6: Set the probation period before the staff can take Other leave types at

Does the company require staff to fulfill minimum month(s) of service before they can apply for Other leave?
- ⦿ Yes
  - After [3 ⬍] months of service
- ◯ No

Step 7: Set whether the staff can take Annual Leave more than what they have now in their leave balance at

Does the company allow staff to apply Annual leave if the number of days applied is greater than their current leave balance?

○ Yes
◉ No

Step 8: Set whether the staff can take Other leave types more than what they have now in their leave balance at

Does the company allow staff to apply Other leave if the number of days applied is greater than their current leave balance?

○ Yes
◉ No

Step 9: Set whether the staff can change the days applied field or set it to a computed field that cannot be changed at

Does the company allow staff to apply Other leave if the number of days applied is greater than their current leave balance?

○ Yes
◉ No

Step 10: Set whether the staff can apply two different leave types on the same day. If set to No, staff will still be able to take half-day of different leaves as long as the timing of the leave does not coincide.

Does the company allow staff to apply different leave types on the same day?

○ Yes
◉ No

Step 11: Set whether the system will deduct one day if the staff takes leave on a day that is set up as a half-day at the company policy working weeks.

Does the company treat leave applied on a half working day as a full-day's leave?

◉ Yes
○ No

Step 12: Set the leave cancellation policy for the staff at

Does the company allow staff leave cancellation that they applied?

○ Yes, all leave cancellations are allowed

◉ Yes, but only for leave cancellations that are submitted before the leave dates.

○ No, all leave cancellations are not allowed.

A. The first option is All leave cancellation are allowed. This option would allow the staff to cancel their leaves even those that they have consumed.
B. The second option is Only leave cancellations submitted before the leave start date are allowed This option allows the staff to cancel their leave if the date has not started. For example, tomorrow is my leave, I can cancel the leave today but once it hit 12.01 am, I cannot cancel the leave anymore.
C. The third option is Staff are not allowed to cancel leave. The staff cannot cancel the leave at all. If they wish to, they will need to ask the leave administrator or their RO/AO (if given the rights) to cancel the leave.
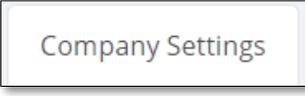
Section 3: Leave Approval Policy

In Leave, we can define how employees' leaves are being approved by the appropriate management staff.

The steps to setting up the leave approval are:

Step 1: Click on

Step 2: Click on

Step 3: Click on

Step 4: Scroll down and click on

Step 5: Indicate if your company requires a Recommending Officer. **Recommending Officer is the one that recommends the leave but is not the final approving person of the leave.**

Does the company require the Recommending Officer (RO) in the approval workflow?

● Yes

○ No

Step 6: Select one option in how the RO/AO of the staff will be assigned in the company.

How are the Recommending Officers (RO) and the Approving Officers (AO) assigned in the company?

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

○ Anyone, any user can be selected as AO/RO.

○ Pre-defined AO, Only users selected by eLeave Admin or eLeave Admin Assistants can be selected as AO and anyone can be selected as RO.

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

Step 7: Decide whether to allow the AO/RO to view staff leave details.

Does the company allow AO/RO to view staff leave details?

● Yes

○ No

Step 8: Set whether the AO/RO can take leave on behalf of the staff. Note that when a block leave is invoked by the AO/RO, the approval progress is no longer required.

Does the company allow AO/RO to apply block leave on behalf of the staff?

● Yes

○ No

Step 9: Set whether the AO/RO can cancel leave on behalf of staff.

Does the company allow AO/RO to cancel leave for staff?

● Yes

○ No

Step 10: Set whether the Leave Administrator shall receive an email if the leave information of the user such as Entitlement or Balances has changed

eLeave administrator will receive an email notification for any changes in the leave information of users?

● Yes

○ No

Step 11: Set if you wish to receive an email notification for every annual leave approved?

eLeave administrator will receive an email notification for every annual leaves approved?

○ Yes

● No

Step 12: Do you allow the AO/RO to approve the leave application through email instead of having to login to their Justlogin accounts.

Does the company allow AO/RO to approve leave applications through email?

● Yes

○ No

Step 13: Set the number of days the AO/RO will receive reminders of pending leave approvals that they have yet to approve. Note that the system will 1 reminder per day per applicant.

Does the company want to send daily email reminders if the pending tasks are not cleared?

● Yes

Send an email reminder for [10 ⬍] days

○ No

Section 4: Other Policies

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

Step 1: Click on

Step 2: Click on

Step 3: Click on

Step 4: Scroll down and click on

Step 5: Select the calendar sharing options.

Does the company allow the leave calendars to be shared in the company?
- ● Yes, all leave calendars are allowed to be shared, including the individual staff's leave calendar.
- ○ Yes, but only the department leave calendar will be shared.
- ○ No, all leave calendars are not allowed to be shared.

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

Step 6: Select the option of whether we allow the staff to see the leave application details of their colleagues. Normally, we will not set this to Yes as they will see the leave entitlement of others.

Does the company allow staff to view details of leave applications shown on the leave calendar?
- ○ Yes
- ● No

Step 7: The leave system can pipe the approved leave to either Google calendar or Outlook calendar if you wish the system to do so. To do that, enter the email address of the calendar as shown below.

Does the company has an external calendar to update for approved leave applications?

⦿ Yes

Email address of external calendar: nursinghome@abc.com.sg

◯ No

Step 8: Lastly select the rounding policy for your company. The rounding policy is to help round up the leave balances which makes it easier to see as opposed to the leave in long decimal formats.

Does the company allow the system to round up all leave days to half days?

⦿ Yes

◯ Default Policy (0.01 to 0.25 → 0, 0.26 to 0.75 → 0.5, 0.76 to 1 → 1)

⦿ 1st Alternate Policy (0.01 to 0.5 → 0.5, 0.51 to 1 → 1)

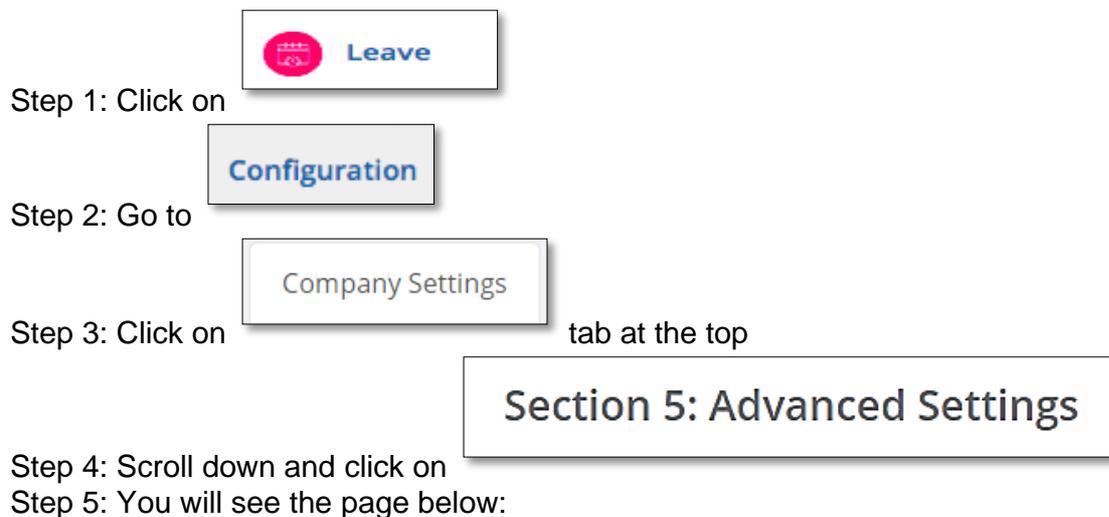◯ 2nd Alternate Policy (0 to 0.49 → 0, 0.5 to 1 → 1)

◯ 3rd Alternate Policy (0 to 0.99 → 0)

◯ No

☐ Exclude rounding policy for non-annual leave

Section 5: Advanced Settings

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

Step 1: Click on Leave

Step 2: Go to Configuration

Step 3: Click on Company Settings tab at the top

Section 5: Advanced Settings

Step 4: Scroll down and click on

Step 5: You will see the page below:

Step 6: Put a tick beside each option that you would like to enable for your system

A. Allow employee to apply leave in hours – this will allow your staff to apply for a leave based on hours, instead of days only. If this is enabled, please indicate the number of hours that is equivalent to one working day:

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

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

D. Attendance OT will Expire ____ month(s) after approval – this option is integrated with the Attendance module. If enabled and staff requests for their OT to be

converted into a leave type on the Attendance module, the Leave system will automatically set an expiry date for such requests

Attendance OT leave will expire [3] month(s) after approval.

Public Holidays

The leave system allows you to add additional public holidays if your company has other holidays besides the one gazetted by MOM.

The steps to adding Public Holidays are:

Step 1: Click on **Leave**

Step 2: Click on **Configuration**

Step 3: Look for the **Public Holidays** tab at the top. Scroll down to the bottom and you will see the fields which you can enter the description and the date of the public holiday you wish to add to the list.

Public Holiday	Date	Action
The first day of January	01/01/2021	✏ ✖
Lunar New Year's Day	12/02/2021	✏ ✖
The second day of Lunar New Year	13/02/2021	✏ ✖
The fourth day of Lunar New Year	15/02/2021	✏ ✖
Good Friday	02/04/2021	✏ ✖
The day following Good Friday	03/04/2021	✏ ✖
The day following Ching Ming Festival	05/04/2021	✏ ✖
The day following Easter Monday	06/04/2021	✏ ✖
Labour Day	01/05/2021	✏ ✖
Birthday of the Buddha	19/05/2021	✏ ✖
Tuen Ng Festival	14/06/2021	✏ ✖
HK Special Administrative Region Establishment Day	01/07/2021	✏ ✖
The day following the Chinese Mid-Autumn Festival	22/09/2021	✏ ✖
National Day	01/10/2021	✏ ✖
Chung Yeung Festival	14/10/2021	✏ ✖
Christmas Day	25/12/2021	✏ ✖
The first weekday after Christmas Day	27/12/2021	✏ ✖
Enter Holiday Name	Enter Holid	

Step 4: Click on the [Save] button to add the holiday to the list.

Leave Types

Leave allows you to set up your own leave type based on your company's requirement.

The steps to set up the leave type are:

Step 1: Click on

Step 2: Click on

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

Show 10 entries   Search: [   ]

Leave Name	Entitlement	Type Of Mode	Days of Calculation	Calendar Color	Action
Birthday Leave	0 days	Per annum	Working days only	■	✏ ✕
Compassionate	3 days	Per incident	Working days only	■	✏ ✕
Compensation Leave	0 days	Per annum	Working days only	■	✏ ✕
Examinations	5 days	Per annum	Working days only	■	✏ ✕
Hospital	30 days	Per annum	Working days only	■	✏ ✕
In Camp Training	0 days	Per incident	Working days only	■	✏ ✕
Marriage	3 days	Per incident	Working days only	■	✏ ✕
Maternity	56 days	Per incident	Calendar days	■	✏ ✕
No Pay	200 days	Per annum	Working days only	■	✏ ✕
Off-In-Lieu	0 days	Per annum	Working days only	■	✏ ✕

Showing 1 to 10 of 13 entries   Previous 1 2 Next

Creating New Leave Type

Step 7: To add a new leave type, click on **Add new leave type** at the lower left area of the page. A pop-up window will appear:

Leave Type	Enter Leave Type
Leave Color	▣ ▾
Entitlement	Enter no. of days per year.
Type Of Mode	Per incident ▾
Days of Calculation	Calendar days ▾
Remarks	

☐ Allow attachment.
    ☐ Requires attachments to be mandatory.
☐ Allows only full day.
☐ Unpaid leave (for transfer to payroll).
☐ For married staff only.
☐ Allows application from staff of a certain gender only.
    Allow Gender ▾
☐ Requires submission of hardcopy documents.

Close   Add new leave type

Step 8: Enter the leave type name

Leave Type	Birthday leave

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

Leave Color	▣ ▾

Step 10: Set the Leave Entitlement for this leave type

Leave Entitlement	1

Step 11: Select the mode. There are 2 modes. One is per annum, and the other is per incident.

Type of Mode	Per annum	⬍

A. Per annum – staff will have the entitlement days for the whole year
B. Per incident – staff will be able to use the entitlement days for every leave application

Step 12: Select the Days of Calculation. There are basically 2 types: Calendar and Working days only

Days for Calculation	Working days only	⬍

Step 13: (Optional) Enter a description or remarks at the Remark field

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

☐ Allows attachments.   Allow applicant to attach document related to leave
    ☐ Requires attachments to be mandatory.

☐ Allows only full day.   Half day not permitted

☐ Unpaid leave (for transfer to payroll).   When approved, an entry will be made on Payroll module for deduction

☐ For married staff only.

☐ Allows application from staff of a certain gender only.   Gender filters for leave

    Allowed Gender [⬍]

☐ Requires submission of hardcopy documents.   Require applicant to submit hard copy as proof of leave

☐ Requires remarks to be mandatory.   Applicant must enter remarks

☐ Notify leave admin when approved.

☐ Leave Entitlement for new staff will be pro-rated.

☐ Leave will be credited daily (accrual).

Step 15: Click on the   **Add Leave Type**   to save

Reminder for hard copy document for proof of leave

Step 16: If you have, in Step 14, stated applicants need to submit hard copy/paper copy of documents for proof of leave, you can tick on this option at the bottom to automate system reminder to the applicant. The applicant will receive an email every day for the duration stated to request them to submit their documents.

Administrators can indicate once the documents are received and the email reminder to the staff will stop

Leave Grade

If you have set your leave policy to be based on "**Entitlement is based on leave grade and joined date**", the Leave Grade tab will appear.

The steps to configure the Leave Grade are as follows:

Step 1: Click on

Step 2: Click on

Step 3: Click on _____ tab at the top

Step 4: Enter the grade name and description accordingly and click on _____ to save each grade.

Entitlement Policy

Once you have configured the grades, you can then assign the leave entitlement based on the grades created.

The steps to doing this are:

Step 1: Click on

Step 2: Click on

Step 3: Click on tab at the top

Step 4: Select the grade you wish to configure at

Step 5: Enter the days of entitlement depending on the years of service

Step 6: Click on button

Leave Entitlement based on joined date

If you configured the leave entitlement setting to **Entitlement is based on joined date**, you see the Leave Entitlement page. In this page, you can define the days entitled to the employees based on the number of years of service.

The steps are as follows:

Step 1: Click on

Step 2: Click on
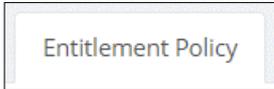
Step 3: Click on **Entitlement Policy** tab at the top. You will see this page.
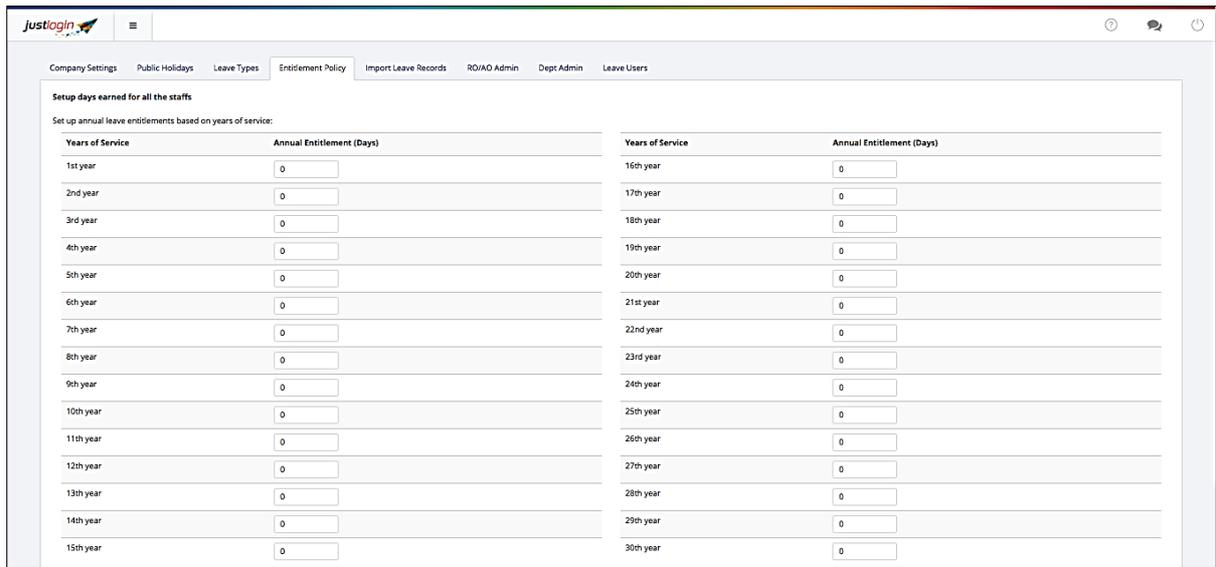
Step 4: Enter the entitlement days based on the number of years of service.

Step 5: Click on **Save** to save the configuration

## RO/AO Admin

Pre-defined AO-Anybody can be the RO

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

Step 1: Click on **Leave**

Step 2: Click on **Configuration**

Step 3: Click on [RO/AO Admin] tab at the top

Step 4: Select the Pre-defined AO
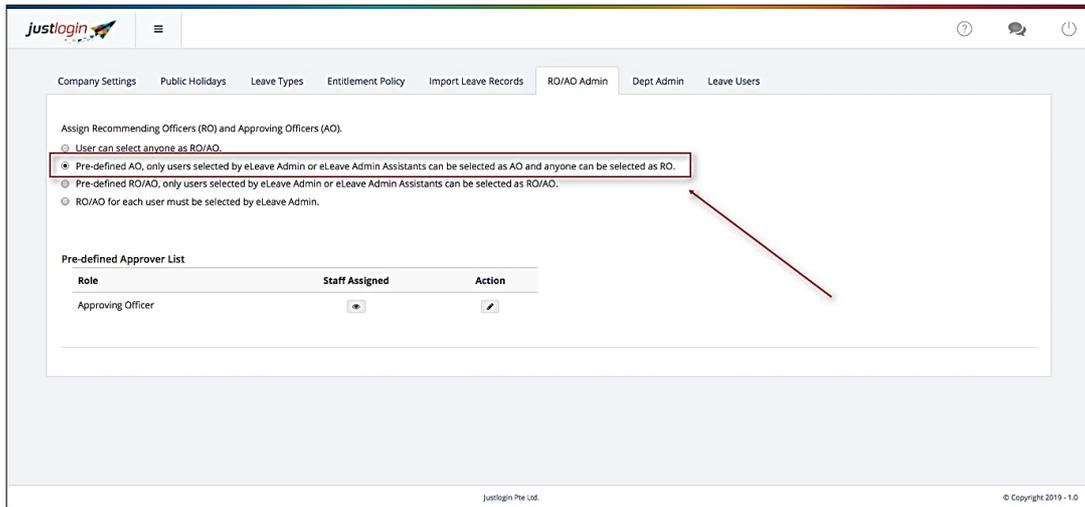
Step 4: Click on

Step 5: The following window will appear. Select the desired AO by putting a tick beside the name
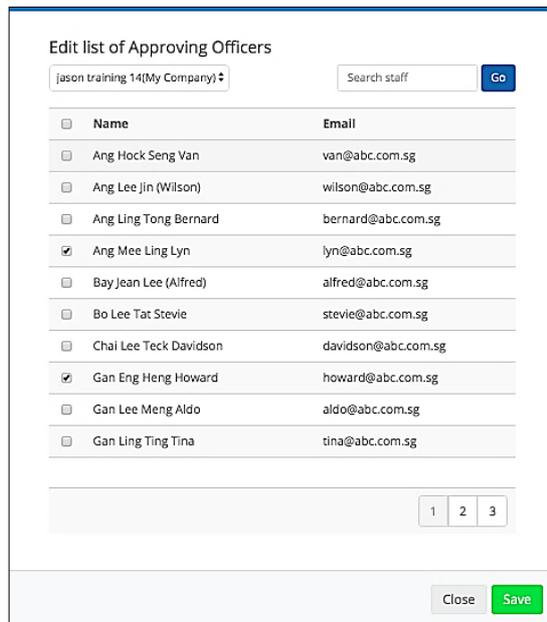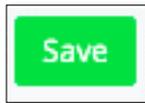
Step 6: Click on to save the selection.

Pre-defined RO/AO

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

Step 1: Click on

Step 2: Click on
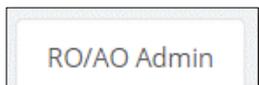
Step 3: Click on
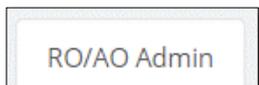
Step 4: Select

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

Pre-defined RO/AO List

Role	Staff Assigned	Action
Recommending Officer	👁	✏
Approving Officer	👁	✏

Step 5: If you wish to add RO or AO, click on the . Select the desired RO/AO

Step 6: Click on to save.

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

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

If your company is large or has many departments with many AO/RO, this option allows you to specify the AO/RO for individual users.
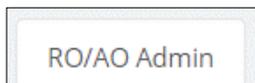
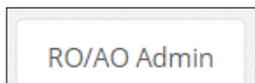Follow the steps below to assign AO/RO for each user:

Step 1: Click on

Step 2: Go to

Step 3: Look for the tab at the top.
Step 4: Select the last option

Step 5: Click on the icon on the right-most column and the fields to assign the AO/RO for the staff will be enabled

Step 6: Click on the button to add the AO and RO for each user.

Step 7: Click on to save the configuration.
Note: You will have to do steps 5-7 for each user

Dept Admin

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

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

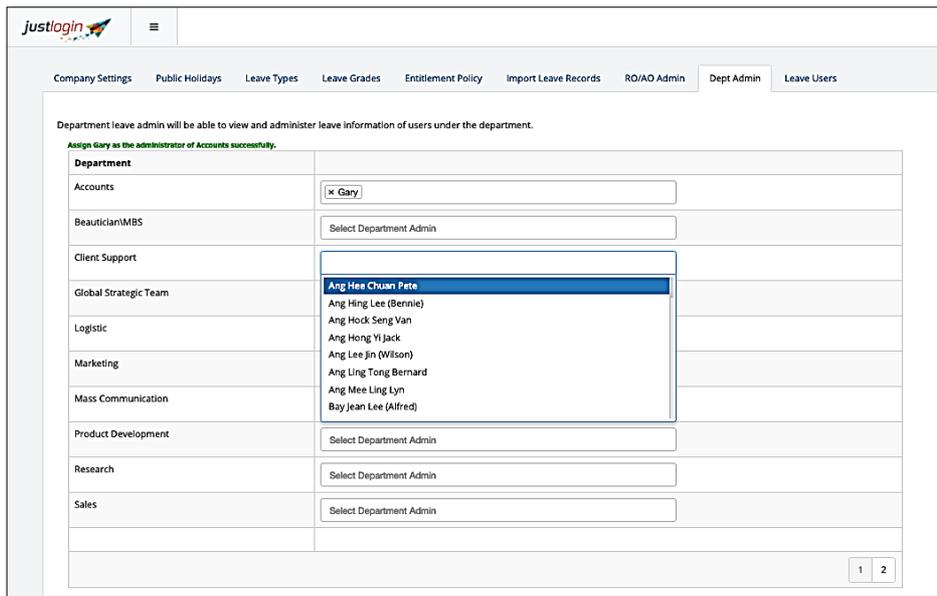To assign Dept Admin, perform these steps:

Step 1: Click on

Step 2: Click on

Step 3: Assign the Dept Admin to the respective department by entering the name of the person who will be made the department's leave administrator.

Leave Users

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

The steps are as follows:

Step 1: Click on

Step 2: Click on   The following screen appears:

Company Settings	Public Holidays	Leave Types	Leave Grades	Entitlement Policy	Import Leave Records	RO/AO Admin	Dept Admin	Leave Users

Show 10 entries   Search:

Emp ID	Employee	Email	Department	Leave ☐
	Ang Hee Chuan Pete	pete@abc.com.sg	Client Support	☑
	Ang Hing Lee (Bennie)	benny@abc.com.sg	Global Strategic Team	☑
	Ang Hock Seng Van	van@abc.com.sg	Marketing	☑
	Ang Hong Yi Jack	jack@abc.com.sg	Client Support	☑
	Ang Lee Huat Tobby	tobby@abc.com.sg	Sales	☐
	Ang Lee Jin (Wilson)	wilson@abc.com.sg	Sales	☑
	Ang Ling Tong Bernard	bernard@abc.com.sg	Logistic	☑
	Ang Mee Ling Lyn	lyn@abc.com.sg	Marketing	☑
	Bay Jean Lee (Alfred)	alfred@abc.com.sg	Sales	☑
	Bay Ling Tong (Kris)	kris@abc.com.sg	Training\Research	☑

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Submit

Those users with the tick in the checkbox are those who have Leave modules enabled
for them. Those without are those who would not be able to use the Leave module.