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 and how to administer the leave system as an administrator.
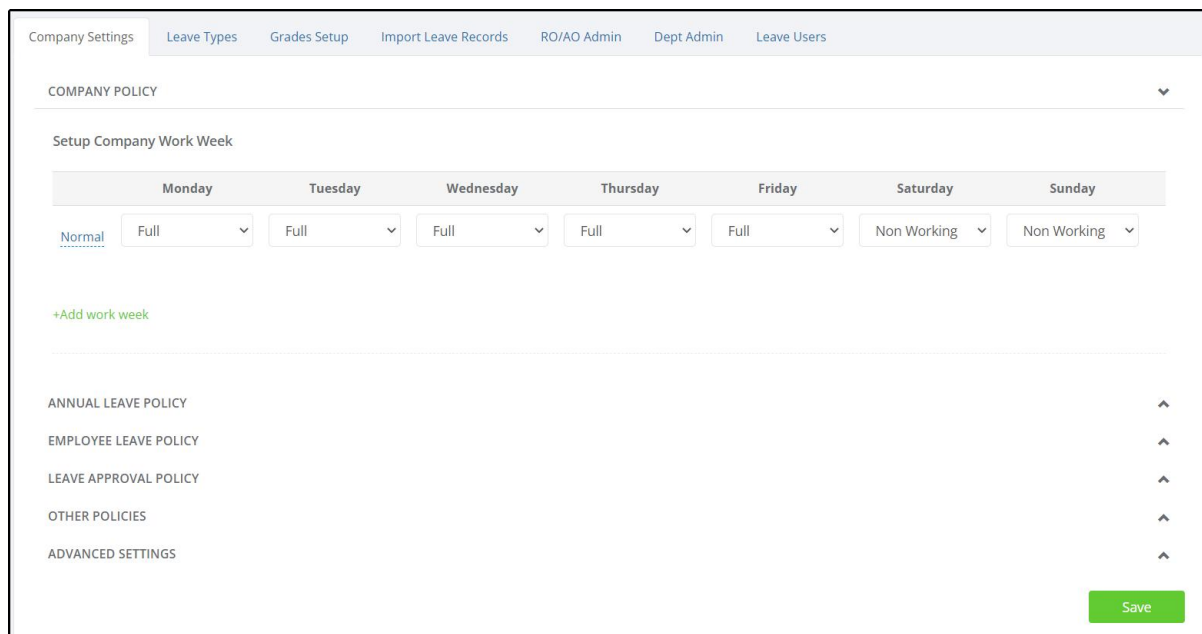
Configuration

COMPANY POLICY
Setup Company Work Week

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

Step 1: Click on .

Step 2: Click on .

Step 3: Click on . You should see this screen:

| | Company Settings | Leave Types | Grades Setup | Import Leave Records | RO/AO Admin | Dept Admin | Leave Users |

COMPANY POLICY

Setup Company Work Week

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Normal	Full	Full	Full	Full	Full	Non Working	Non Working

+Add work week

ANNUAL LEAVE POLICY

EMPLOYEE LEAVE POLICY

LEAVE APPROVAL POLICY

OTHER POLICIES

ADVANCED SETTINGS

Save

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

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

on +Add work week and set accordingly.

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

COMPANY POLICY								
Setup Company Work Week								
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
Normal	Full	Full	Full	Full	Full	Non Wor	Non Wor	
Alternate 1 ✓ ✗	Full	Full	Full	Full	Full	Non Wor	Non Wor	🗑

ANNUAL LEAVE POLICY
Annual Leave Policy Setup

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

Annual Leave Policy Setup

Leave Accrual

Daily

- Daily
- Monthly
- Calendar Year
- Financial Year
- Employee Anniversary

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

Leave Calculation Based on – This is to indicate how the yearly entitlement will be based on, whether by Calendar Years (Beginning of the Calendar Year, 01 Jan) or Years of Service (Anniversary Date).

Policy for New Employees

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

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

Completed Month - only the completed months will be counted for proration

Full month entitlement if join date is before or on 15th of the month - if join date is 1st-15th of the month, user will get FULL month entitlement. If join date is 16th onwards, NO entitlement for the month.

Full entitlement only if join date is before or on 15th of the month. Half month entitlement if join date is after 15th of the month - if join date is 1st-15th of the month, user will get FULL month entitlement. if join date is 16th onwards, user will get HALF month's entitlement.

Annual Leave Setting

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

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

☑ Allow employees to apply leave ⬚ 2 ⬚ days in advance.

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

☑ Allow attachment.

    ☑ Requires attachments to be mandatory.

Annual Leave is applicable

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

Annual Leave is applicable

⬚ 3 ⬚ month ∨ after Join Date

Annual Leave Notifications

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

Annual Leave Notifications

☑ Notify leave administrator when Annual leave is approved.

EMPLOYEE LEAVE POLICY

Staff policy allows you to set staff-related policies such as the probationary period and other leave-related policies.

 This will provide you with a detailed explanation of each of the functions in this section. Employee Leave Settings.

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

EMPLOYEE LEAVE POLICY

Employee Leave Settings

☐ Allow employee to apply other leave types more than their current balance.

☐ Allow employee to apply different leave types on the same day.

☐ Allow employee to edit "days applied" field when applying leave.

☐ Treat leave applied on a half working day as a full-day's leave.

1. Whether the staff can take Other Leave types, if they apply more than what their current leave balance.

2. Whether the staff can apply two different leave types(overlap) on the same day. If set to No, staff will still be able to take half-day of different leaves as long as the timing of the leave does not coincide.

3. Whether the staff can change the days applied field.

4. Whether the system will deduct one day if the staff takes a leave on a half-day working day (based on assigned Work Week).

Leave Cancellation

Set the leave cancellation policy for the staff.

Leave Cancellation

◉ Allow leave cancellations.

○ Allow leave cancellations submitted before leave date applied.

○ Disallow leave cancellations.

1. All leave cancellations are allowed. This option would allow the staff to cancel their leaves regardless of the status. If leave has already been approved, cancellation will go through another approval by the Approver.

2. Leave cancellation is allowed ONLY if cancellation is done prior to the leave date. e.g. I have filed a leave for Friday, I can cancel the leave until Thursday, 11:59 pm.

3. Users are NOT allowed to cancel the leave. The staff will not have an option to cancel the leave at all. If they wish to, they will need to go

through the Leave Administrator or their Approvers (if given the rights) to cancel the leave.

LEAVE APPROVAL POLICY
Approvers Settings

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

system.

1. Whether to allow the Approver to view staff leave details.

2. Whether the Approver can apply leave on behalf of the staff. Note that when a block leave is invoked by the Approver, the approval progress is no longer required.

3. Whether the Approver can cancel leave on behalf of staff.

4. If you allow the Approver to approve the leave application through email instead of having to log in to their Justlogin accounts.

OTHER POLICIES
Leave Calendars

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

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

Leave Calendars

☐ Allow employees to view leave details on the leave calendar.

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

☑ Sync approved leaves to external calendar.

Email address of external calendar: calendar@justlogin.com

Leave Calendar Sharing Policy

Select the calendar sharing options.

Leave Calendar Sharing Policy

◉ All leave calendars are allowed to be shared.

○ Only the department leave calendar will be shared.

○ No, all leave calendars are not allowed to be shared.

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

Round Up Leave Balance Display

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

Round Up Leave Balance Display

☑ Enable rounding policy for Annual Leaves.

◉ Leave balance rounded to 0.01 to 0.25 → 0, 0.26 to 0.75 → 0.5, 0.76 to 1 → 1

○ Leave balance rounded to 0.01 to 0.5 → 0.5, 0.51 to 1 → 1

○ Leave balance rounded to 0 to 0.49 → 0, 0.5 to 1 → 1

○ Leave balance rounded to 0 to 0.99 → 0

☐ Exclude rounding policy for other leave types.

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

Leave Email Notifications

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

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

- The option to exclude the section showing colleagues on leave will appear in the approval email notification to approvers.

If this option is unticked: Approvers will be able to see which colleagues are on leave during the employee's leave application period.

If this option is ticked: Approvers can still see which colleagues are on leave during the employee's leave application period. However, the system will not trigger email notifications to employees on block leave and will exclude them from the daily notification on staff who are on Leave today.
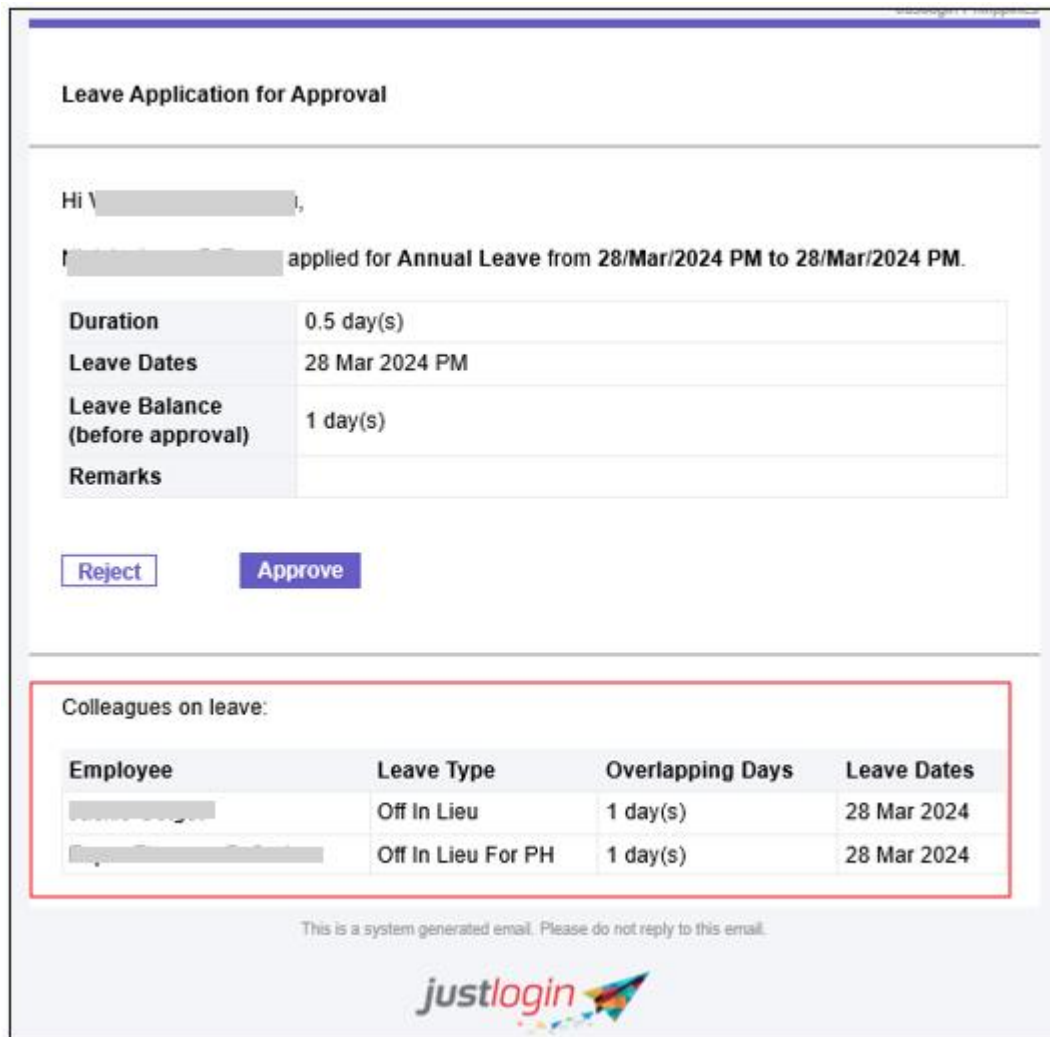
ADVANCED SETTINGS

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

Hourly Leave

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

Off-In-Lieu

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

Off-In-Lieu
☑ Enable Off-in-Lieu request

Off-in-Lieu leave will expire [3 ▾] month(s) after approval.

☐ Send email reminders [1 ▾] day(s) before leave expires.

Adjustment

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

Adjustment
☑ Enable adjustment with expiry date.

Overtime Leave

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

Overtime Leave
Overtime leave will expire [3 ▾] month(s) after approval.

Employee on Leave Email Settings

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

Employee on Leave Email Settings

☑ Send who is on leave today email notification.

☐ EveryOne
☑ Leave Administrator
☐ Supervisor
☐ Colleagues (People reporting to same supervisor)

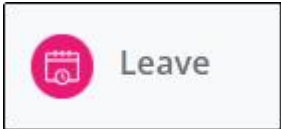AND NOTE: For any changes to the configuration, please do not forget

to click on .

Leave Types

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

The steps to set up the leave type are:

Step 1: Click on .

Step 2: Click on .

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

| Company Settings | Leave Types | Grades Setup | Import Leave Records | RO/AO Admin | Dept Admin | Leave Users |

For year 2022

Show 10 entries   Search:

Leave Type	Entitlement	Entitlement Type	Days for Calculation	Calendar Color	Default to new employees	Assigned Employees	Action
Annual (Brought Forward)	0	Per Annum	Calendar Days	▾	☑	All Employees	🗑
Blocked	365	Per Annum	Calendar Days	▾	☑	All Employees	🗑
Childcare (Foreigner)*	2	Per Annum	Working Days	▾	☑	All Employees	
Childcare (Singaporean)*	6	Per Annum	Working Days	▾	☑	All Employees	
Compassionate	3	Per Incident	Working Days	▾	☑	All Employees	🗑
Examinations	5	Per Annum	Working Days	▾	☑	All Employees	🗑
Extended Childcare Leave*	2	Per Annum	Working Days	▾	☑	All Employees	
Extended Maternity*	40	Per Annum	Working Days	▾	☑	All Employees	
Hospitalisation Leave*	60	Per Annum	Working Days	▾	☑	All Employees	
In Camp Training	0	Per Incident	Working Days	▾	☑	All Employees	🗑

System Leave Types Settings

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

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

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

For Sick Leave and Hospitalisation Leave, see guide here - How does Sick Leave and Hospitalization Leave work when it comes to entitlement, opening balance and adjustment? – JustLogin Help Center

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

Creating New Leave Type

Step 7: To add a new leave type, click on **Add New Leave Type** in the lower-left area of the page. A window will appear:

Add/edit leave type

Leave Type

[   ]

Color

[🟧 ▾]

Other Leave Options

☐ Allow attachment.
    ☐ Requires attachments to be mandatory.
☐ Allows only full day.
☐ Unpaid leave (for transfer to payroll).
☐ Requires submission of hardcopy documents.
☐ Requires remarks to be mandatory.
☐ Leave Entitlement for new staff will be pro-rated.
☐ Notify leave admin when approved.
☐ Allow employees to apply leave [0] days in advance.
☐ Hide Leave Type from Calendar.

Entitlement

[0] [Calendar days ▾] ◉ per annum   ○ per incident

Remarks

[   ]

Applicable

[3] [months ▾] after Join Date

Applicable To

◉ All Employees
    ☐ For married staff only.
    ☐ For [Select gender ▾] only
○ [None selected ▾] ☑ Default for new employees

[Back]   [Save]

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.

Color

🟧 ▾

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

Entitlement

[0] [Calendar days ▾] ◉ per annum   ○ per incident

Per annum – staff will have the entitlement days for the whole year

Per incident – staff will be able to use the entitlement days for every leave application.

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

Remarks

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

Applicable

3   months   ∨   after Join Date

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

Applicable To

⦿ All Employees

☐ For married staff only.

☐ For   Select gender   ∨ only

○   None selected ▾   ☑ Default for new employees

You may also assign specific employees to it too:

⦿   None selected ▾   ☑

☐ **Select all**

Human Resources

☐ Ariel Norman

☐ Arra Jones

☐ Ava Miller

Subject Experts

☐ Riana Castro

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

Other Leave Options

☐ Allow attachment.

    ☐ Requires attachments to be mandatory.

☐ Allows only full day.

☐ Unpaid leave (for transfer to payroll).

☐ Requires submission of hardcopy documents.

☐ Requires remarks to be mandatory.

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

☐ Notify leave admin when approved.

☐ Allow employees to apply leave [0] days in advance.

☐ Hide Leave Type from Calendar.

Step 15: Click on the [Save] button to save.

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

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

Leave Type	Entitlement	Entitlement Type	Days for Calculation	Calendar Color	Default to new employees	Assigned Employees	Action
Annual (Brought Forward)	0	Per Annum	Calendar Days	▾	☑	All Employees	🗑
Blocked	365	Per Annum	Calendar Days	▾	☑	All Employees	🗑
Childcare (Foreigner)*	2	Per Annum	Working Days	▾	☑	All Employees	
Childcare (Singaporean)*	6	Per Annum	Working Days	▾	☑	All Employees	
Compassionate	3	Per Incident	Working Days	▾	☑	All Employees	🗑
Examinations	5	Per Annum	Working Days	▾	☑	All Employees	🗑
Extended Childcare Leave*	2	Per Annum	Working Days	▾	☑	All Employees	
Extended Maternity*	40	Per Annum	Working Days	▾	☑	All Employees	
Hospitalisation Leave*	60	Per Annum	Working Days	▾	☑	All Employees	
In Camp Training	0	Per Incident	Working Days	▾	☑	All Employees	🗑

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

Step 3: Click on to save the changes.

Grades Setup

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

The steps to configure the Leave Grades are as follows:

Step 1: Click on .

Step 2: Click on .

Step 3: Click on tab at the top.

To create a Leave Grade, click on

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

Add/edit leave grade

Leave Grade

Entitlement

0

Set up leave entitlements based on years of service

Assign Employees to Grade

None selected ▾

Back

Save

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

Leave Grade

Entitlement

0

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

Set up leave entitlements based on years of service

Set up leave entitlements based on years of service

No. of years after hire   No. of extra day

Sorry, no data to display.

+ Add More

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

No. of years after hire	↕ No. of extra day		
4	2	**16** Total Entitlement Days after **4 years**	🗑
6	4	**20** Total Entitlement Days after **6 years**	🗑

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

on the icon

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

Step 9: Click on to save the settings.

Import Leave Records

This is ideal if the administrator would like to upload the historical leave data to the account.

Note: This will not check the staff's working week/days, please verify if employee is indeed working on the submitted dates.

Steps

Step 1: Log in to the account.

Step 2: Go to .

Step 3: Click on .

Step 4: Click on the tab.

Step 5: Click on . This will download an excel file, which contains a sample data like the sample image below:

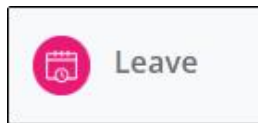| UserID	From Date(yyyymmdd)	To Date(yyyymmdd)	No Of Days	Leave Type	AO
userID1	20200914 AM	20200914 PM	1	Annual	UserID2
userID2	20200915 AM	20200915 PM	1	Annual	UserID2

Step 6: Complete the template based on the guide below:

Header	Description
UserID	Make sure the UserID exists in the system
From Date(yyyymmdd)	Make sure the format is YYYYMMDD with AM/PM
To Date(yyyymmdd)	Make sure the format is YYYYMMDD with AM/PM
No Of Days	Can be 1 or 0.5 day. It should match the FROM / TO date
Leave Type	Make sure it matches the complete name of the Leave Type in system
AO	Place the UserID of the Final Approver / 2nd Approver
RO	If there are 2 approvers, place the UserID of first approver

Step 7: Save the template. Return to the Import Leave Records page, click on "Drop File Here" field so you can choose the file that you just completed and saved in your computer.

Upload File

Drop file here

Step 8: You will see this icon once you have chosen the correct
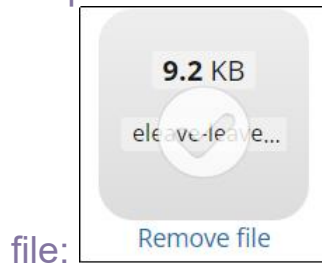
file:

Step 9: Click on the button.

Step 10: Select which sheet in the Excel file your data is in by ticking the

radio button .

Step 11: Click on .

Step 12: The system will collect the data in the Excel template. Click

on to proceed.

Step 13: You will then be able to preview the data based on the template you have uploaded. To confirm that what is in the preview is correct,

click on .

If the data in the preview is wrong, you can choose other

options .

Note: Avoid changing the headers from the template file to avoid getting errors.

Step 14: The system will verify the data. Should there be any errors, the reason for the error will be displayed. Make the necessary changes. If no errors, just click .

Step 15: The list of entries from your data will be displayed to confirm the import has been a SUCCESS.

Company Settings	Leave Types	Grades Setup	Import Leave Records	RO/AO Admin	Dept Admin	Leave Users

✔ UPLOAD DATA FILE   ✔ SELECT TABLE INSIDE DATA FILE.   ✔ SELECT INFO SOURCE TO KEEP.   ✔ CONFIRM INFO SOURCE   5. PREVIEW DATA POPULATION.

UserID	From Date(yyyymmdd AM/PM)	To Date(yyyymmdd AM/PM)	No. of days	Leave Type	RO User ID (not needed if the company does not require ROs)	AO User ID	
mei	2022-10-14 AM	2022-10-14 AM	1	Annual		nielsie	Success
merry	2022-10-14 AM	2022-10-14 AM	1	Annual		nielsie	Success
deib	2022-10-14 AM	2022-10-14 AM	1	Annual		nielsie	Success

Close

Step 16: Click on when done.

Department Admin

The Dept Admin allows the company to set up different administrators for different departments/groups. Once the staff is assigned as the department administrator, he will be able to administer to the leave for that department.

The only thing that the department administrator has no rights to is the configuration tab.

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

To assign Dept Admin,

Step 1: Go to .

Step 2: Click on **Configuration** .

Step 3: Click on **Dept Admin** .

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

| Company Settings | Leave Types | Grades Setup | Import Leave Records | RO/AO Admin | Dept Admin | Leave Users |

Department leave admin will be able to view and administer leave information of users under the department.

Department	
Accounting	
	Arra Jones
	Ava Miller
Customer Service	Billy Joe
	Celly Hernandez
Finance and Payroll	Charlie Thomas
	Claire Smith
Human Resources	Clark Anderson
	Deib Enrile
Leasing	
Management	Select Department Admin
Managers	Select Department Admin
Operations	Select Department Admin
Part-Time	Select Department Admin
Subject Experts	Select Department Admin

Leave Users

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

Step 1: Go to **Leave** .

Step 2: Click on **Configuration** .

Step 3: Click on **Leave Users** and you will see this page.

Company Settings	Leave Types	Grades Setup	Import Leave Records	Dept Admin	Leave Users

Show 10 ∨ entries   Search:

Employee ID	Employee	Email	Department	Leave ☐
	Bruce Wayne	vila.justlogin@gmail.com	Finance	☑
	Dan Lim	vila.justlogin@gmail.com	Procurement	☑
	Elektra Natchios	vila.justlogin@gmail.com		☑
	Frank Castle	vila.justlogin@gmail.com	Finance	☑
	Fu Ming Wu 吴福明	vila.justlogin@gmail.com	Accounts	☑
	George Stan	vila.justlogin@gmail.com	Operations	☑
JL_EM0001	Harry Anderson	vila.justlogin@gmail.com		☑
0004	Jeff Leff	vila.justlogin@gmail.com		☑
	Jen Pang	vila.justlogin@gmail.com	Finance	☑
	Lady Yap	vila.justlogin@gmail.com	Finance	☑

Showing 1 to 10 of 20 entries   Previous 1 2 Next

Those users with the tick in the checkbox are those who have Leave modules enabled for them. Those without would not be able to use the Leave module. Put a tick in the checkbox if you want to assign the staff as a user of the Leave module.
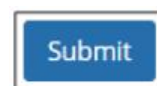
Step 4: Please do not forget to click on the [Submit] button to save the changes.