Advanced Leave - User Guide

Contents

1.0 Audience

This document is intended as a complete guide for Administrative users of OrangeHRM. This document has been designed for non-specialists; specialists may find the document a useful point of reference. By reading this guide, you will learn how to use OrangeHRM through the elements of the graphical user interface and what is behind some of the advanced features that are not always obvious at first sight. The aim of this guide is to enable you to address some common problems that frequently appear for users of OrangeHRM.
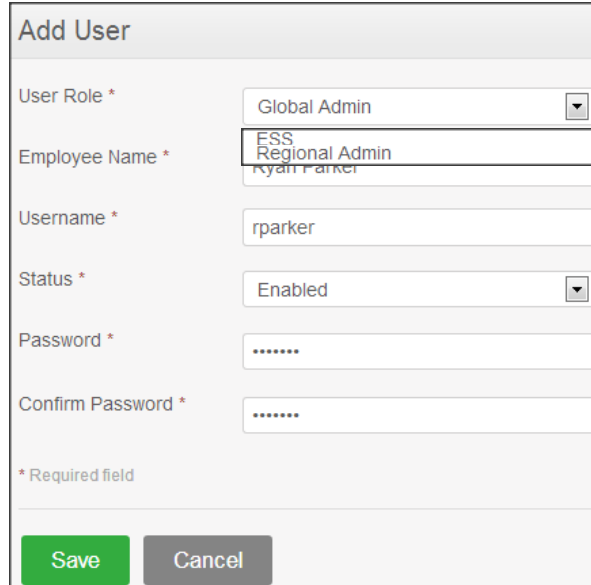
2.0 What is Advanced Leave?

The Advanced Leave module of OrangeHRM enables setting up of custom leave periods, country-based leave types, application restrictions, leave accrual rules and carry forward rules. The module also features a leave calendar which can be used by supervisors, HR administrators and employees to plan leave. A reporting feature is also included.

Key Features:

- Set up leave types with hire-date based leave periods & custom leave periods.
- Set up leave rules specific to each country or region.
- You can have Global and Regional administrators
- Configure apply-restriction criteria for each leave type.
- Set up annual, monthly and quarterly accrual rules based on Job Title, Employment Status and Years of Service.
- Set up leave carry forward rules with expiration dates for leave carried forward.
- Leave calendar with detailed view of leave statuses.
- Generate Reports to view the Leave Entitlements and Usage Reports of employees within any given leave period.

3.0 Assigning Admin Access Rights

Global and Regional administrator with any combination of access rights can be assigned to employees. To assign, go to Admin>> Users, click "Add" and the screen as shown in Figure 3.0 will appear.

Figure 3.0: Add System Users- Global/Regional Admin

Enter the following fields:

- User Role:
  - ○ *Global Admin*– has access to all the modules in the system and can view and access all employees' information within the system working in different locations/regions of the organization.
  - ○ *Regional Admin*- has access to all the modules in the system and can only view and access all the employees' information within the system working in one region/location of the organization.
  - ○ *ESS*- refers to employee access where Supervisors has access to his personal information as well as his subordinates and ESS-Employee only has access to his personal information.

- Employee Name: name of the employee whom user role can be assigned to. Note: Employees need to be added to the system first under PIM>>Add Employee.
- Username: define a username for the employee
- Status: select enable to allow employee to access the system with the defined user role.
- Password/Confirm Password: provide a password for the employee and confirm password for security purposes.

Once the fields are added, click "Save" and the entry will be listed as shown in Figure 3.1.

Figure 3.1: System Users List

If you want to assign Regional Admin access to an employee, follow the process shown in Figure 3.0 however select "Regional Admin" as the user type. Save the form and you will be directed to the same screen as shown in Figure 3.1. To assign a region to an employee, click on "Change Region(s)" of the entry and the screen as shown in Figure 3.2 will appear.

Figure 3.2: Select User Regions

Select from the drop down selection. Multiple regions can be selected. Click "Save" once done.

4.0 Configuring the Advanced Leave Module

This is a comprehensive leave management module with extensive features of defining leave types, setting up of custom leave periods, configuring apply-restriction criteria for each leave type, setting up country based leave rules, setting up leave accrual and leave carry forward rules, generating employee leave reports and providing a leave calendar feature with detailed view of leave status. It also caters for all leave application and approval processes and is able to display information on leave entitlements, balance, history etc.

The functionality of the Leave Module differs depending on the rights of the user:

Global Admin can:

- View and assign leave entitlements for each leave type for all employees in all the locations/regions of the organization.
- Configure leave periods, leave types, work week and holidays
- Assign Leave for any employee
- See scheduled leave and taken leave for any employee
- Generate leave entitlement reports and usage reports
- If an employee has been assigned **global admin user role**, then he/she will see the 'Apply' 'My Leave', 'My Entitlements' and 'My Leave Entitlements and Usage Report' options along with the rest of the features.
- View the leave calendar which will display all types of leaves for a month for all or individual departments.

Regional Admin can:

- Perform all actions as the global admin but is limited within the assigned region(s).

ESS-Supervisor can:

- View his Personal and Employee (subordinate) Leave Entitlements and Usage Reports
- View Leave List
- Apply Leave
- Assign Leave for his/her subordinates
- Approve/Reject Leave for his/her subordinates
- View leave calendar which will display all types of leaves for a given month for all subordinates or for his division.
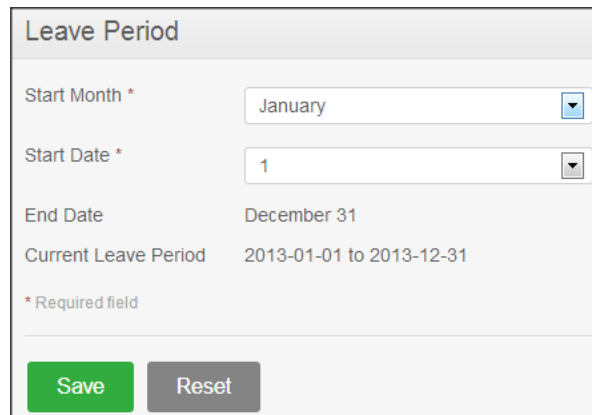
ESS-Employee can:

- View his Leave Entitlements and Usage Report.

- View his detailed leave application
- Apply for leave
- View his leave calendar which will display all his leave during a particular month.
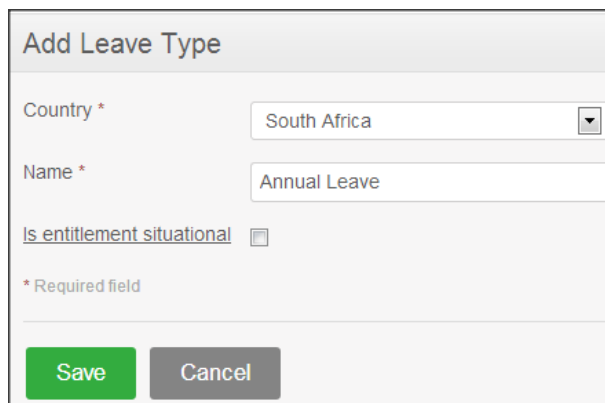
4.1   Configure Leave Period

The administrator and other users with admin rights are able to define the default leave period that will be used when applying/assigning leave (unless selected otherwise). To define a leave period, go to **Leave>> Configure>> Leave Period** and a screen as shown in Figure 4.0 will appear.

Figure 4.0: Define Leave Period

4.2   Configure Leave Types
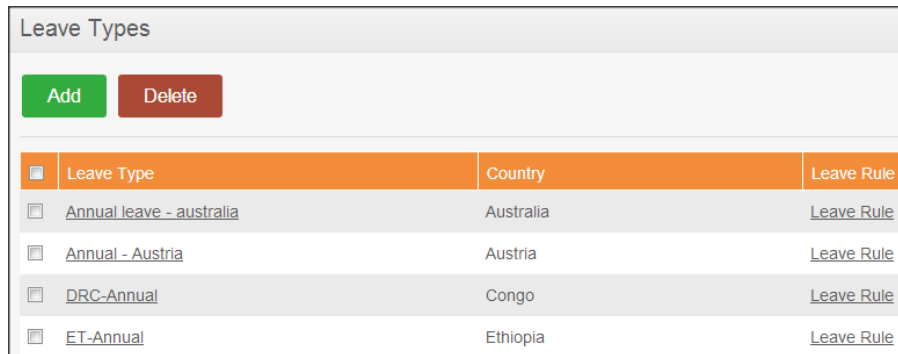
The administrator and other users with admin rights can define leave types used within the organization. Leave types can be defined with country-based leave rules, custom/hire-date based leave periods, apply-restriction rules, leave accrual rules and leave carry forward rules. To define leave types, go to **Leave>> Configure>> Leave Types**, click "Add" and the screen as shown in Figure 4.1 will appear.

Figure 4.1: Add Leave Type

Enter the leave type Name and select the Country from the drop down selection in which the following leave type applies to. Click Save.
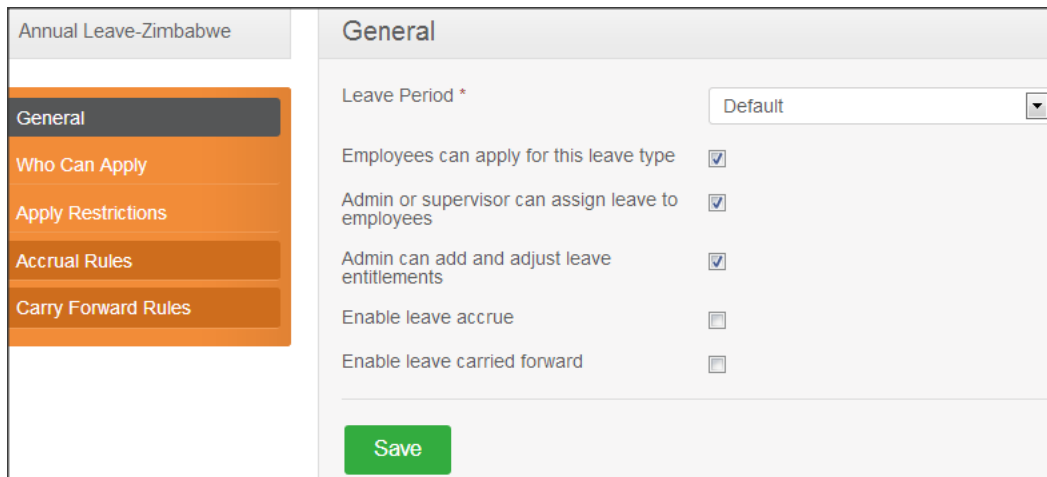
The page with all the defined Leave Types should open (Figure 4.2). Click on a Leave Type to edit the name if you wish to.

Figure 4.2: Leave Types

To configure the leave rules, click on "Leave Rule", and a window as shown in Figure 4.3 should appear.
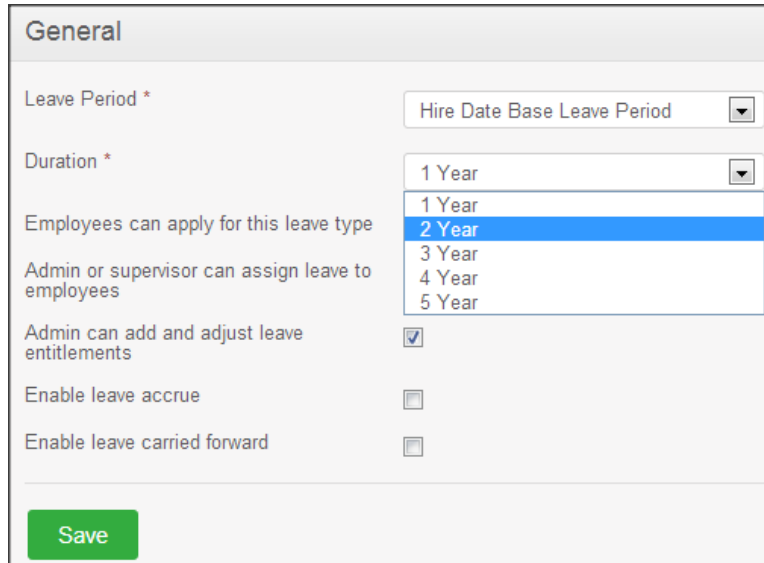

Figure 4.3: Configure Leave Rules

4.2.1 General

The following rules can be selected and be applied for the leave type and the country defined:

- Leave Period can be selected from the dropdown menu:
    - *Default* - default leave period that was set in section 4.1.
    - *Hire Date Based Leave Period* - leave period calculated from the date that employees were hired. Duration can also be selected (Figure 4.4).
    - *Custom Leave Period* - leave period can be manually set by selecting a 'Start Month', 'Start Date' and 'Duration' (Figure 4.5).
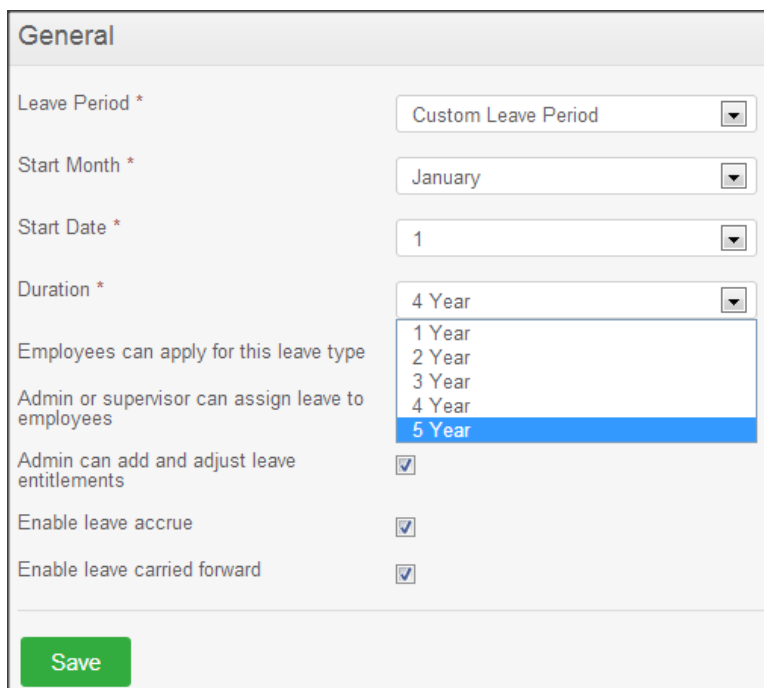- Admin or Supervisor can assign leave to employees.

- Employee can apply for this leave.
- Admin can add and adjust leave entitlements.
- Enable leave accrue.
- Enable leave carry forward.

*Figure 4.4: Hire Date Based Leave Period*

Figure 4.5: Custom Leave Period

Click on the checkbox of the particular leave rule to apply.

Note: "Leave Accrual" and "Leave Carry Forward" rules can only be configured by ticking the appropriate boxes in the "General" rule window, and then clicking "Save".

4.2.2 Who Can Apply

The administrator can define the employee eligibility of the leave type defined based on employees':

➢ **Job Titles** - Select the job titles of the employees who will be able to apply for the defined leave, as shown in Figure 4.6.
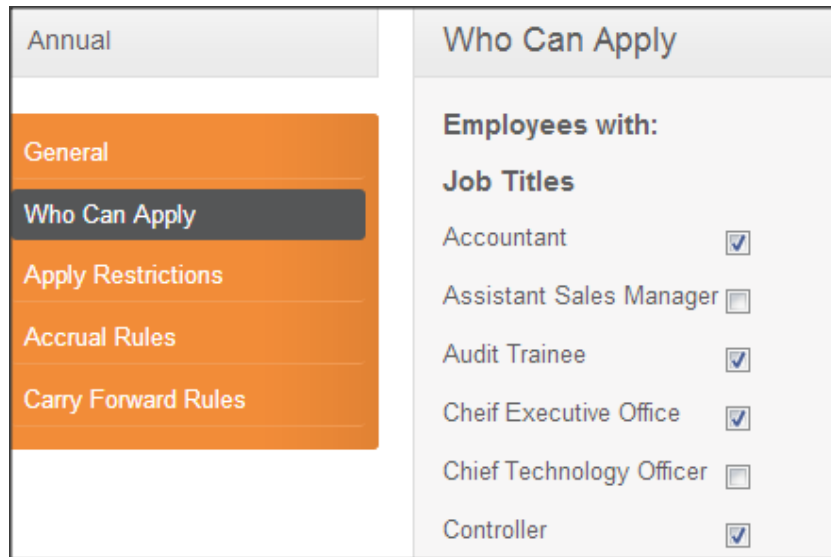
Figure 4.6 Leave Eligibility based on Job Title

➢ **Employment Status** - Select the employment statuses of the employees who will be able to apply for the defined leave, as shown in Figure 4.7.

Figure 4.7: Leave Eligibility based on Employment Status

> **Years of Service** - Define the years of service to be eligible to apply for the defined leave, as shown in Figure 4.8.
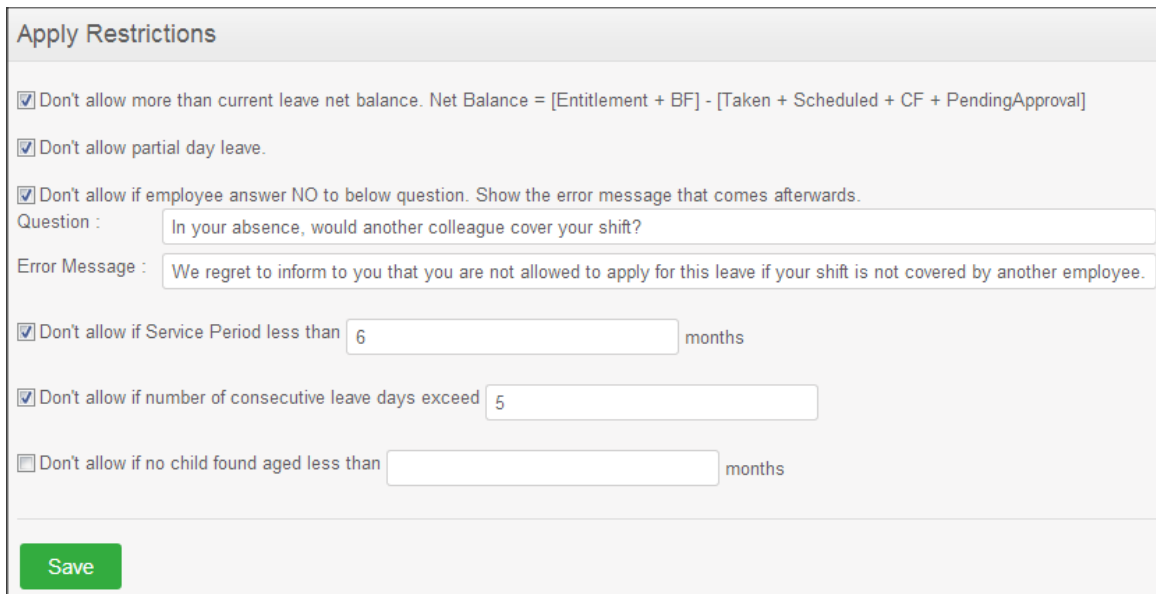

Figure 4.8: Leave Eligibility based on Years of Service

Click "**Save**" once you have configured the leave eligibility.

4.2.3 Apply Restrictions

The administrator can set up employee 'Apply Restrictions' for the following leave type defined as shown in Figure 4.9.

Figure 4.9: Apply Restriction

Apply Restriction Rules:

1. **Don't allow more than current leave net balance.**

The administrator can set this apply restriction for the following leave type and restrict employee from applying for more than the current leave net balance.

It is thus calculated as **Net Balance = [Entitlement + Brought Forward] - [Taken + Scheduled + Carried Forward + Pending Approval]**

Example:
On Nov 06, 2012 John applied for 11 days annual leave. The annual leave entitlement for John is 20days for leave period Jan-01-2012 to Dec-31-2012. John has already taken 5 days of his annual leave where he also has 3days pending approval annual leave, and 2 days scheduled leave. He has brought forward 7 days annual leave from leave period Jan-01-2011 to Dec-31-2011 to the current year (Jan-01-2012 to Dec-31-2012).

Leave carry forward rule is set (See Figure) where maximum number of leave to be carried forward to the next leave period (Jan-01-2013 to Dec-31-2013) is 5 days where leave carry forward date is Dec 31st of the current.

Leave Carried Forward would still be unknown until it **is** calculated on Dec 31st and remains "0" days.

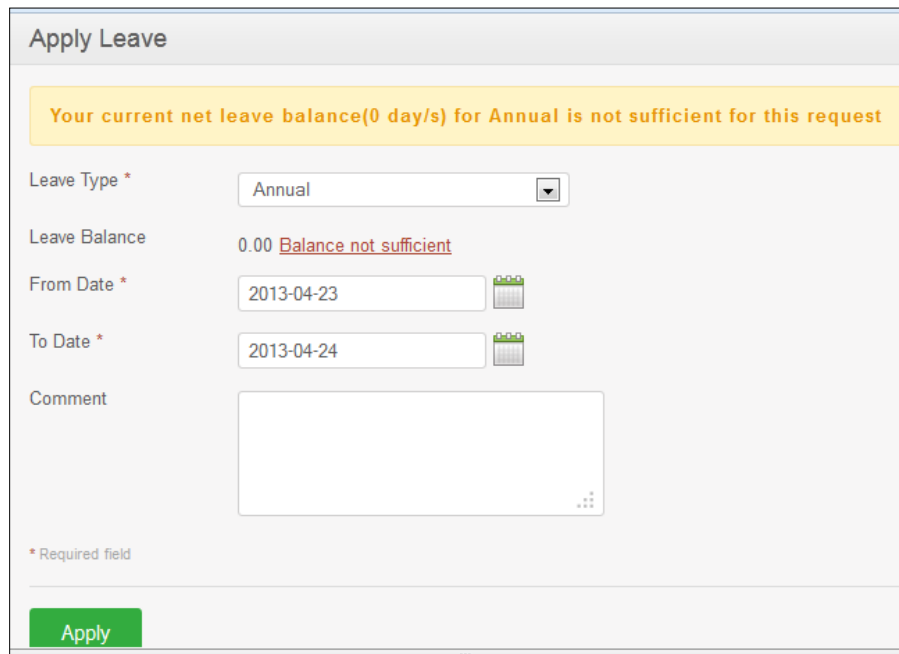To know if John is eligible to apply for 6 days annual leave:

Net balance = [20+3]-[5+7+3+3]
Net Balance = 23-18
Net Balance = 5

Since the net balance for the current year is 5 days, and John has applied for 11 days annual leave. He is restricted from applying for 11 days which exceed his current net balance.

The following error message would appear if the employee applies for leave outside the net balance.
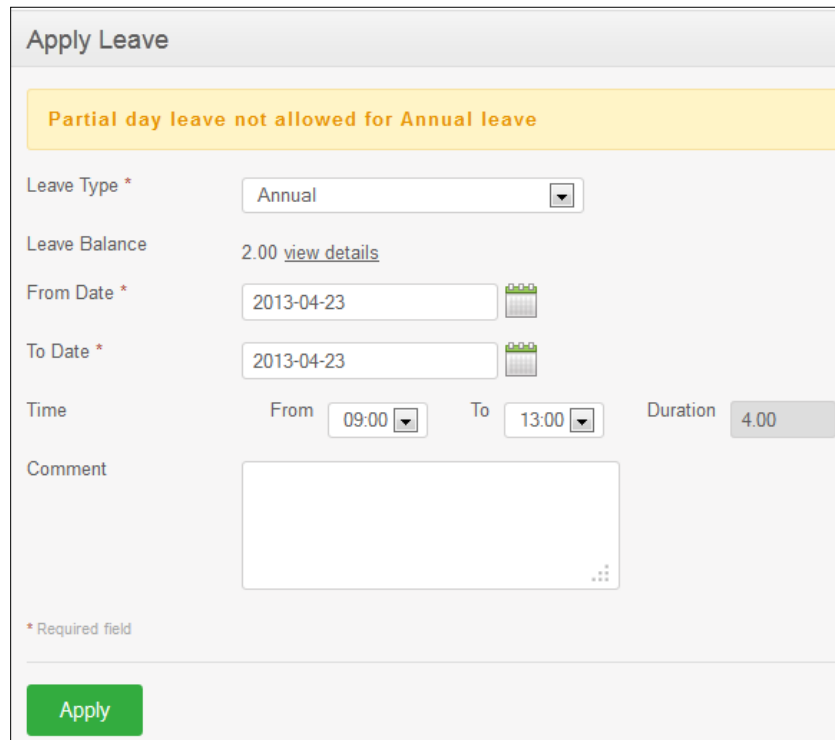

Figure 5.0: Net Balance Apply Restriction

2. Don't allow partial day leave

Administrators can also set this apply restriction to restrict employee from applying for the defined leave type as a partial day leave.

When employees applies for a partial day leave via **Leave>>Apply Leave** the following error message would appear as shown in Figure 5.1.

Figure 5.1: Do not allow partial leave/half day leave
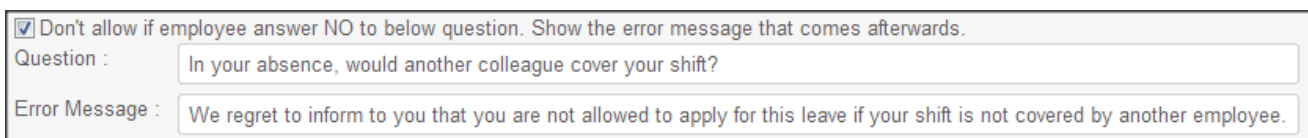
3. Don't allow if employee answer NO to below question. Show the error message that comes afterwards.
   Question :
   Error Message :

This apply restriction can be set when employees apply for the leave type defined. Follow up questions can be applied when employees apply for the defined leave type and if employee answers "NO" for the question defined, employee would receive an error message that is also set up by the administrator.

Enter Question and Error Message in their respective boxes as shown in Figure 5.2.

Figure 5.2: Question & Error Message

When employee applies for the leave type defined via Leave>>Apply Leave the screen as shown in Figure 5.3 will appear.

Figure 5.3: Apply Restriction Question

If the employee selects "No" and clicks "Save", the screen as shown in Figure 5.4 will appear.

Figure 5.4: Apply Restriction Error Message

4. Don't allow if service period less than ( ) months
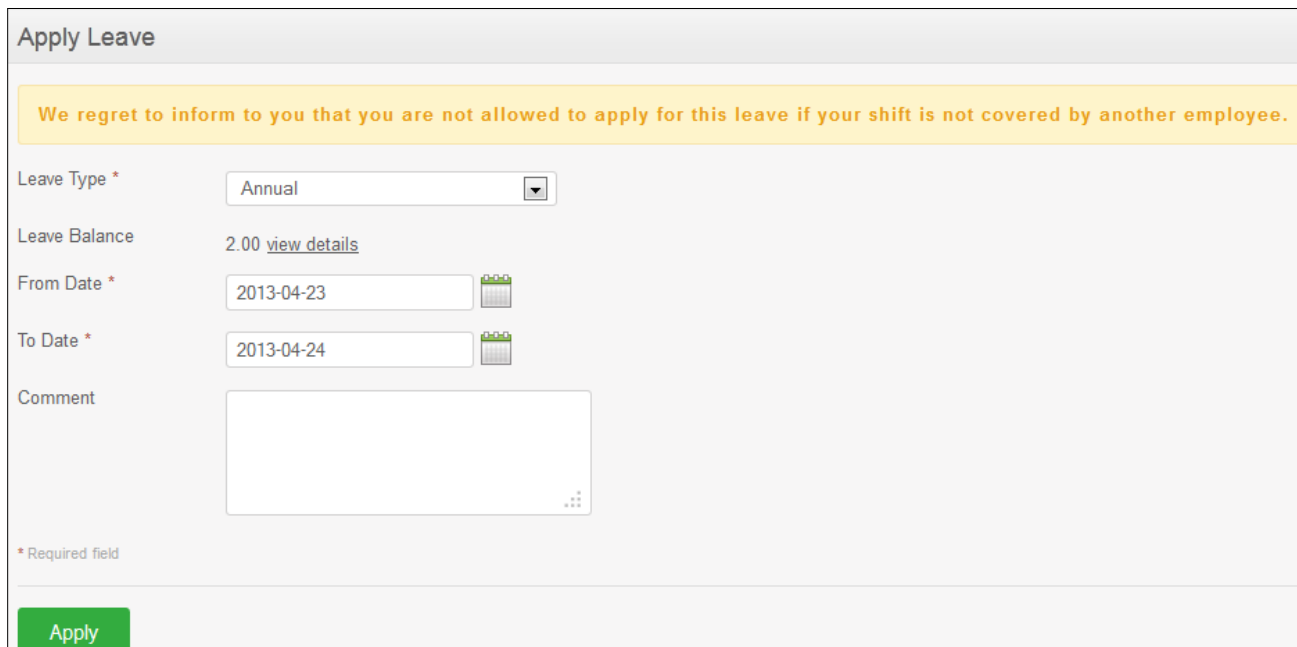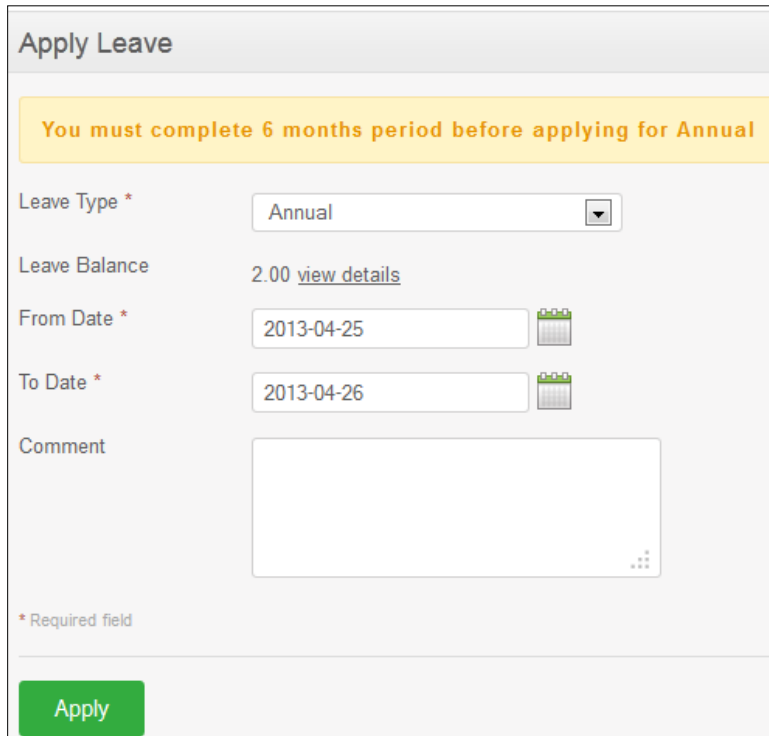
The administrator can set this apply restriction to restrict employees from applying for this leave if they have only worked for the organization outside the service period restriction defined. (See employee joined date via **PIM>>Click on Employee>> Job>>Joined Date**).

If the defined maximum period of service is 6months, and when the employee's service period is less than 6months from the time he/she has joined the company and applies for leave via **Leave>> Apply Leave** the following error message as shown in Figure 5.5 will appear.
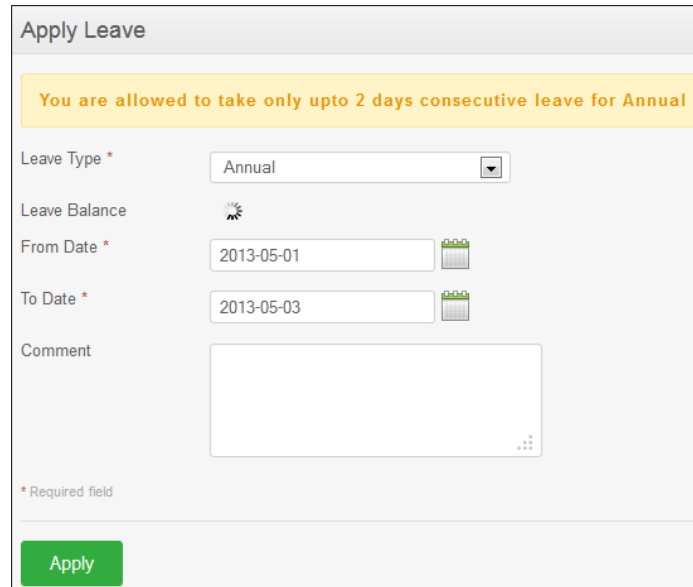
Figure 5.5: Service Period Eligibility

5. Don't allow if number of consecutive leave exceeds ( ) days

The administrator can set this apply restriction to restrict employees from applying for this leave if the leave request is for a specific number of consecutive days defined.
If the maximum number of consecutive leave days is only set to 2 days and if the employee applies for 3 consecutive days leave the error message as shown in Figure 5.6 will appear.
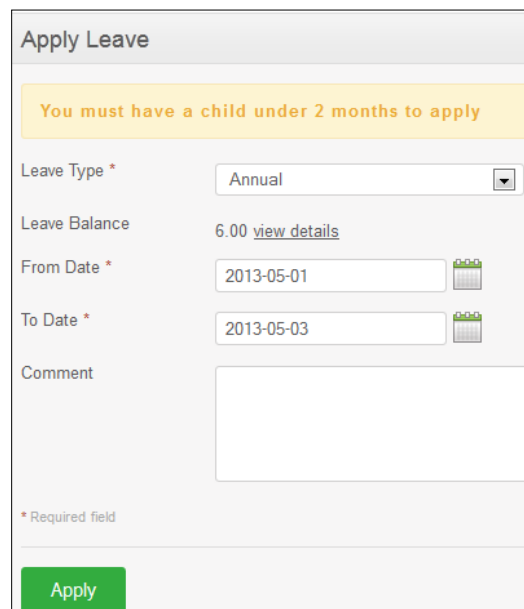
Figure 5.6: Apply restriction due to exceeding number of consecutive leave

6. Don't allow if no child found aged less than ( ) months

The administrator can set this apply restriction to restrict employees from applying for this leave if the system finds no dependents (child) under PIM>> Employee List>> Click on Employee Name>>Dependents.

If the age limit of a dependent (child) is defined as less than a certain period (2 months for example), it further restricts employee from applying for the defined leave if in case the employee's dependent's age (child) is over the limit defined and the error message as shown in Figure 5.7 would appear.
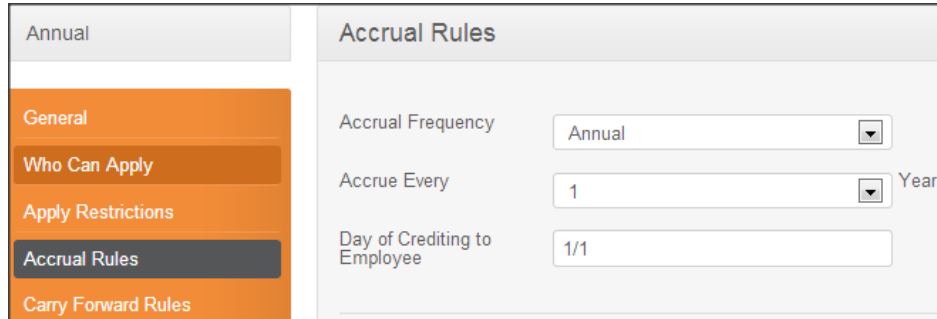
Figure 5.7: Dependent's (Child) Age limit apply restriction

Click "**Save**" once you have configured the Apply Restriction for the leave type defined.

4.2.4 Accrual Rules

The administrator can set up accrual rules for the leave type defined. To configure leave accrual rules, click on "Accrual Leave" and the screen as shown in Figure 5.8 will appear.

Figure 5.8: Configuring Accrual Rules
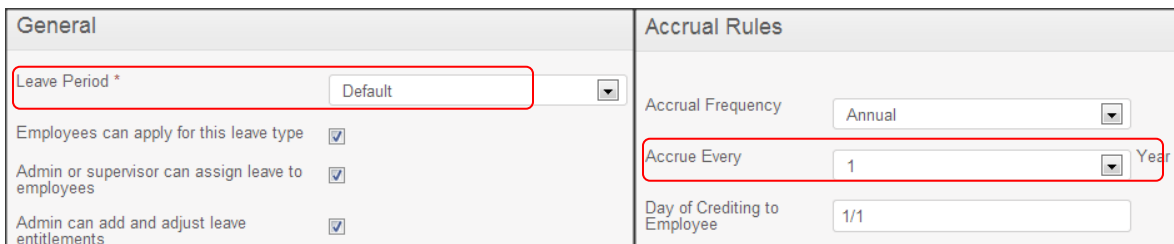
Select the accrual frequency from the drop down selection

Annually

1. Accrue Every – drop down selection in 'years', depends on the 'Leave Period' selected under the 'General' tab.

If you select the:

➢ Default leave period: Accrue Every 1 year (Figure 5.9.1)

Figure 5.9.1: Accrue Every (for Default Leave Period)

➢ Hire Date Based leave period OR Custom leave period: The following options are available to select depending on the duration of the leave period (Figure 5.9.2).

Leave Period Duration (Years)	Options to accrue every given number of years
1	1 - Accrues on each year
2	1 - Accrues on each year
	2 - Accrues on year 1 of each leave period
3	1 - Accrues on each year of the leave period
	3 - Accrues on year 1 of each leave period

4	1 - Accrues on each year of the leave period
	2 - Accrues on year 1 and year 3 of each leave period
	4 - Accrues on year 1 of each leave period
5	1 - Accrues on each year of the leave period
	5 - Accrues on year 1 of each leave period

Figure 5.9.2: Accrue Every (for Hire Date Based Leave Period & Custom Leave Period)

2. Days of Crediting to Employee –
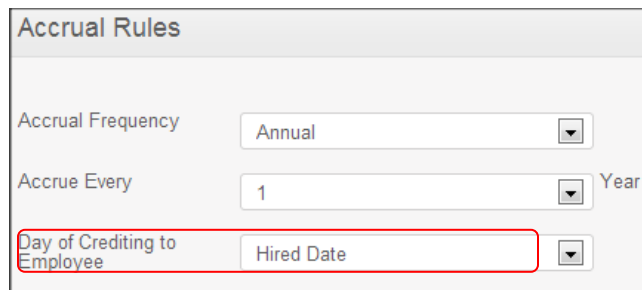
➢ Default leave period: can be manually entered (MM/DD format), as shown in Figure 5.9.3.

Figure 5.9.3: Day of Crediting to Employee (Default Leave Period)
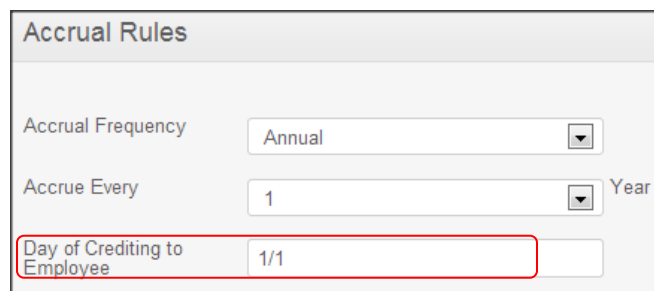
➢ Hire Date Based leave period: Default day of crediting will be the employees joined date anniversary (hired date) as shown in Figure 5.9.4. This value **cannot** be changed.

Figure 5.9.4: Day of Crediting to Employee (Hire Date Based Leave Period)

➢ Custom leave period: Default day of crediting will be the start date of the leave period (Month and date) as shown in Figure 5.9.5. This value **can** be changed.

Figure 5.9.5: Day of Crediting to Employee (Custom Leave Period)

Monthly
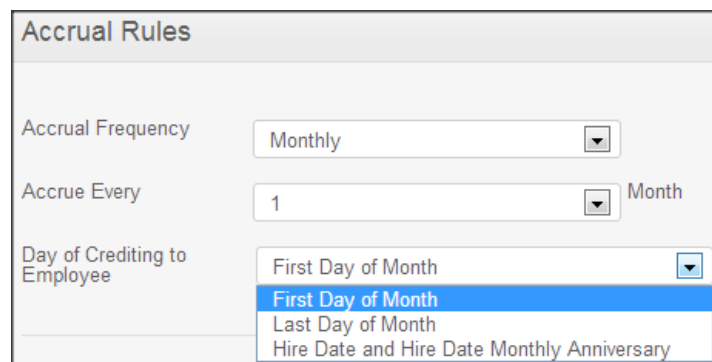
1. Accrue Every – allows for the admin to define to accrue of leave every selected number of months. Appears in a drop down selection in months, as shown in Figure 5.9.6.
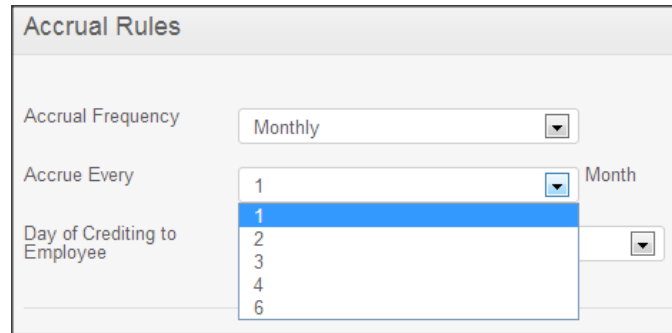

Figure 5.9.6: Accrue Every (Monthly)

2. Day of Crediting to Employee – the options include; First Day of Month, Last Day of Month, Hire Date and Hire Date Monthly Anniversary (if leave type's leave period is Hire Date based), as shown in Figure 5.9.7.

Figure 5.9.7: Day of Crediting to Employee (Monthly)

Leave Entitlements Per Employee Group

➢ This section defines how a set of employees are grouped, and the number of days of leave this group accrues per defined leave frequency.
➢ It is possible to define any number of employee groups. The groups are applied in the order they are defined.
➢ An employee can only belong to one group (the first one that the employee is selected into)

➢ The following rules and settings can be configured per group (Figure 5.9.8):
   o Group Name
   o Number of days of Leave Accrued: System accrues the specified number of days of leave to employees who are selected to this group, per defined frequency, on the defined date.
   o Accrue Entitlements Up To a Maximum of [ ] Days

Figure 5.9.8: Employee Groups

➤ Employees get selected to a group based on the following filters:
  o Job Title (Figure 5.9.9) OR
  o Employment Status (Figure 5.9.10) OR
  o Years of Service (Figure 5.9.11)

Figure 5.9.9: Job Titles

Figure 5.9.10: Employment Status
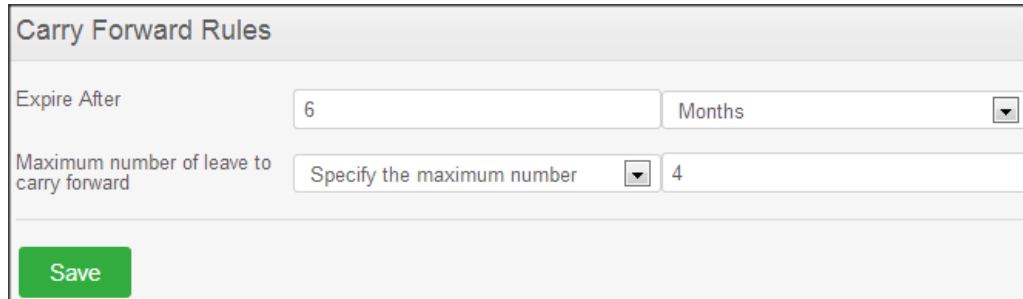
Figure 5.9.11: Years of Service

Enter the following fields and click "**Save**".

4.2.5   Carry Forward Rules

The administrator can set up carry forward rules for the leave type defined. To configure leave carry forward rules, click on "**Carry Forward Rules**" and the screen as shown in Figure 6.0 will appear.

Figure 6.0: Configuring Carry Forward Rules

Enter the following fields:

- ***Expire After:*** duration after which carried forward leave will expire. Options include:
  - Months
  - Weeks
  - Days
- ***Maximum number of leave to carry forward:***
  - Specify the maximum number (enter number of leave on the blank box)
  - All remaining days

Click "**Save**" once done.

4.3   Configure Work Week
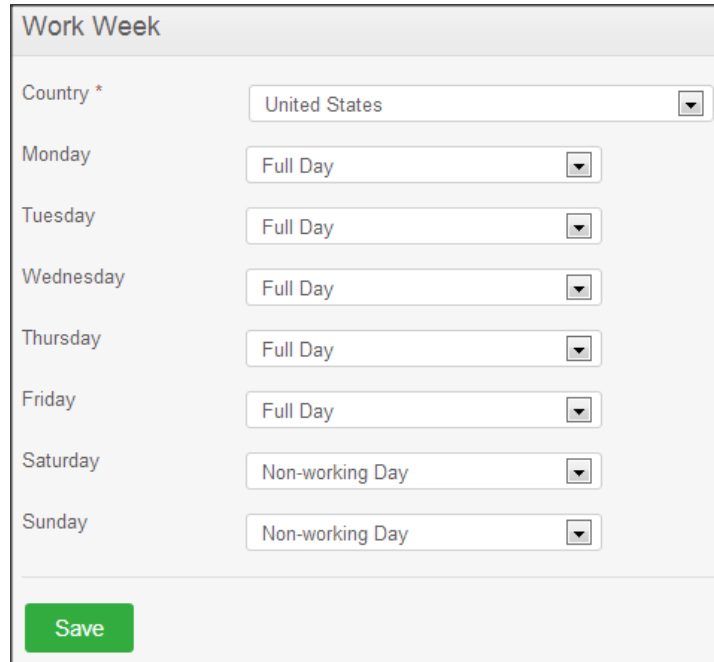
The administrator and any other users with admin rights will be able to define the work weeks for all employees based in different locations/countries.

To define work week, go to **Leave>> Configure>> Work Week** and the screen as shown in Figure 6.1 will appear.

Click "Edit" to define the work week. Select the country where the work week applies to from the drop down selection.

In this feature, you can define the days that the company in a particular country operates whether they are:
- Full Day
- Half Day
- Non-Working Day
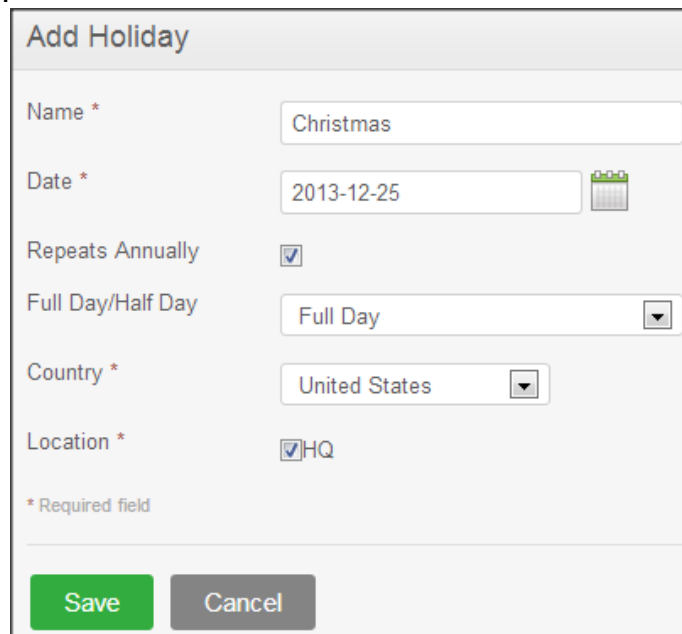
Figure 6.1: Configuring Work Week

4.4   Configure Holidays

The administrator and other users with admin rights can define holidays that will be applicable to the companies located in different countries and will be taken into consideration while calculating leave duration.

To define "Holidays", go to **Leave>> Configure>> Holidays** and click "Add", a screen as shown in Figure 6.2.1 will appear.

Figure 6.2.1: Add Holiday

Enter the "Name of the Holiday", the "Date" it will occur and checking the "Repeats Annually" will mean that the holiday will occur on the same date in the following years and select whether the holiday stated will be considered as a "Full Day /Half Day" holiday.
Select the country where the holiday is applicable for, the company locations would be populated, where the administrator can further select the company locations the holiday is applicable to.

Note: Locations need to be defined first under **Admin>>Organization>>Locations.**

Click "**Save**" once you have defined the holiday.

Once a holiday is added, it will be listed as shown in Figure 6.2.2.

Figure 6.2.2: List of Holidays

You also have the option to also "**Search**" for the holidays that are occurring within particular period as well as the country and company locations associated with that country.

5.0 Entitlements
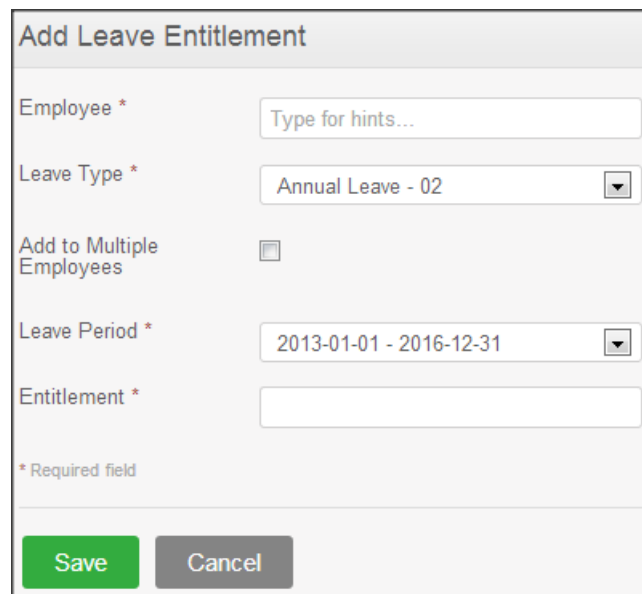
This feature allows users to add (Admin Users only) and view employee leave entitlements. The menu will show data depending on the user type:

- **Admin:** will see "Add Entitlements" and "Employee Entitlements" and has full rights.
- **ESS User-Supervisor**: will see "Employee Entitlements" (subordinates only) and "My Entitlements" and has viewing rights only.
- **ESS User**: will see "My Entitlements" and has viewing rights only.

5.1   HR Admin View of Leave Entitlements

As an Admin user, this feature enables the HR Admin and other users with admin rights to Add and View Leave Entitlements for each leave type for all employees.

To add an entitlement to employees, click on **Leave>>Entitlements>>Add Entitlements** and the screen shown in Figure 6.3 will appear.
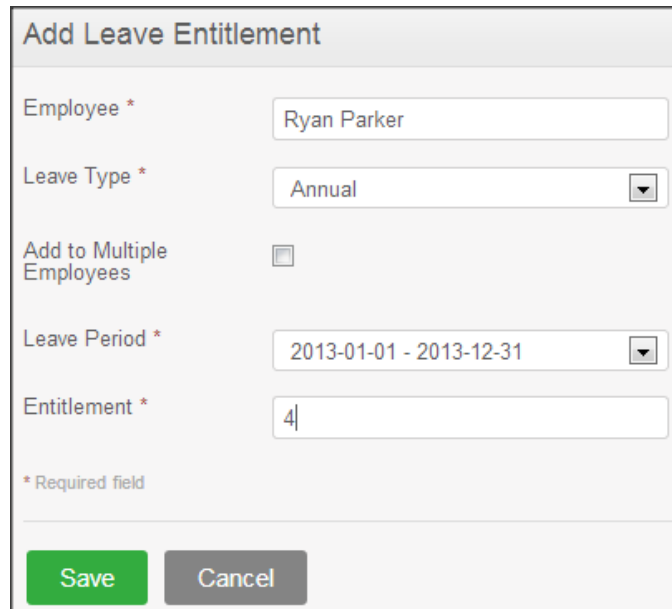
Figure 6.3: Add Leave Entitlement

The HR Admin can select the employee to assign leave to by typing his/her name in the "Employee" textbox.

The "Leave Type" (defined under Configure>>Leave Types) can then be selected from the dropdown menu.

The "Leave Period" can then be selected. The number of days to assign to that employee can then be given in the "Entitlement" textbox, as shown in Figure 6.4.
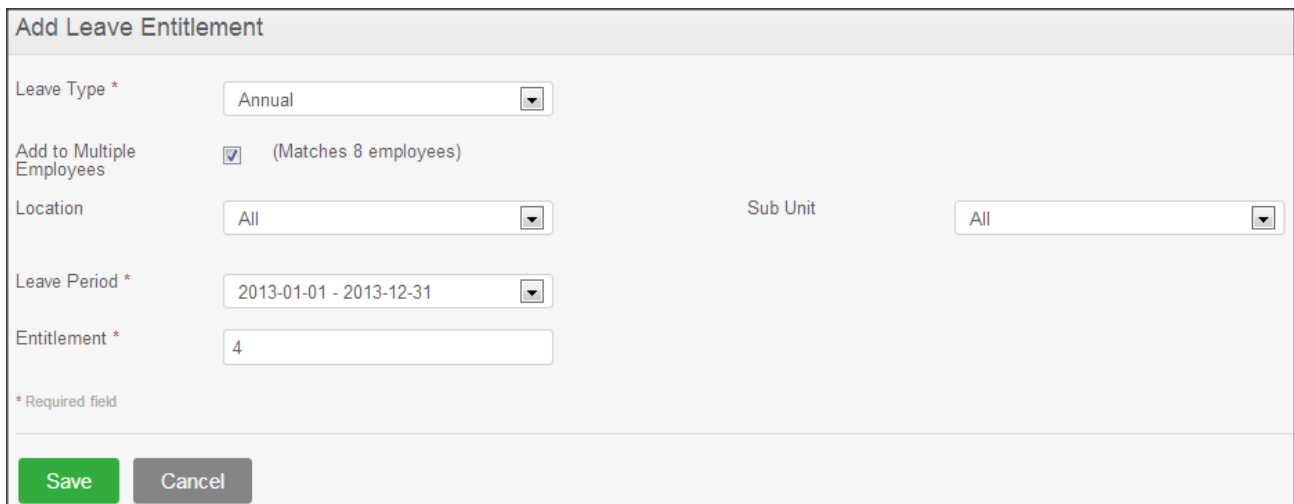
Figure 6.4: Add Leave Entitlement to an employee

If the Admin selects "Add to Multiple Employees", then the "Employee" field gets replaced with a "Location" and "Sub Unit" field.

The Admin can now select a specific location and a sub-unit, and assign a leave entitlement for a certain "Leave Type" to all employees in that location and sub-unit by clicking "Save", as shown in Figure 6.5.

Figure 6.5: Add Leave Entitlement to Employees by Location and Sub-Unit
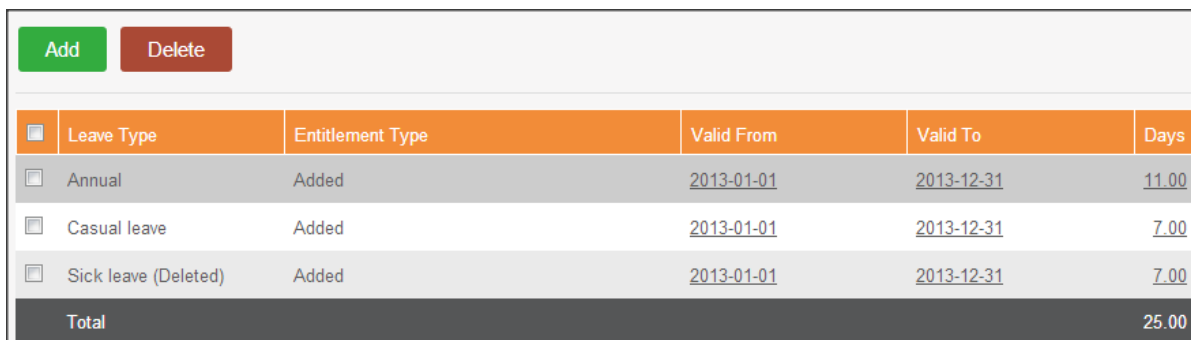
To view an employee's leave entitlement, the HR Admin can click on **Leave>> Entitlements >> Employee Entitlements** as shown in Figure 6.6. The Admin can type in the Employee name and select the "Leave Type" from the drop down.

Figure 6.6: Search Employee Entitlements

Clicking "Search" will pull up all the leave that that particular employee has been entitled, as shown in Figure 6.7. Clicking "Add" will bring up the "Add Leave Entitlement" window (as shown in Figure 6.3).

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking "Delete".

Figure 6.7: View Employee Entitlement

To edit the leave entitlement, click on the number of days entitled under "Days", or the date under "Valid From" or "Valid To" and the window as shown in Figure 10.9 will appear.
The Admin will only be able to change the "Leave Period" and the "Entitlement". Click "Save" once the values have been changed.

Figure 6.8: Edit Employee Entitlement

5.2   ESS Supervisor View of Leave Entitlements

An ESS –Supervisor is only able to "View" his own leave entitlement (**Leave>>Entitlements>>My Entitlements**) and his subordinates leave entitlements (**Leave>>Entitlements>>Employee Entitlements**) when he/she logs in (Figure 6.9).

*Note: An HR Admin will enter the leave entitlement on behalf of an ESS-Supervisor and an ESS-Employee.
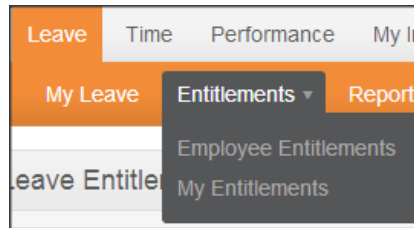
Figure 6.9: ESS-Supervisor Entitlements menu

To view his/her own leave entitlement, the ESS Supervisor has to click on **Leave>> Entitlements >> My Entitlements.** He/she can then search by "Leave Type". Clicking "Search" will show all available leave entitlements as shown in Figure 7.0.

Leave Type	Entitlement Type	Valid From	Valid To	Days
Annual	Added	2013-01-01	2013-12-31	11.00
Casual leave	Added	2013-01-01	2013-12-31	7.00
Sick leave (Deleted)	Added	2013-01-01	2013-12-31	7.00
Total				25.00

Figure 7.0: ESS-Supervisor- My Entitlements

To view a subordinates leave entitlement, the Supervisor has to click on **Leave>>Entitlements >>Employee Entitlements** and then type in the name of the subordinate under "Employee", and select the "Leave Type", as shown in Figure 7.1.

Figure 7.1: ESS-Supervisor - Subordinate Entitlement Search

Clicking "Search" will then show the leave that has been entitled to that subordinate, as shown in Figure 7.2.

Figure 7.2: ESS-Supervisor View of Subordinate Entitlement

5.3   ESS-Employee View of Leave Entitlements

An ESS-Employee is only able to "View" his leave entitlement when he/she logs in. To view, go to **Leave>> Entitlements>> My Entitlements** and a screen as shown in Figure 7.3 will appear.

Figure 7.3: ESS-Employee View of Leave Entitlements

6.0 Reports

This feature allows users to generate Leave Entitlements and Usage Reports of employees. The HR Admin can select between two main criteria when generating reports: "Leave Type" and "Employee" (Figure 7.4).

Figure 7.4: Generate Reports For

If the HR Admin selects "Leave Type", he will then be presented with the following fields to select from (Figure 7.5).

Figure 7.5: Leave Type Report Generation view

Once the appropriate fields are selected, the Admin can then click "View" and will be presented with the leave report of all employees based on the previously selected criteria (Figure 7.6)

Employee	Current Leave Period	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)	
Tyronne Baker	2013-01-01 - 2013-12-31	0.00	0.00	0.00	0.00	0.00	Show Timeline
Mark Boucher	2013-01-01 - 2013-12-31	14.00	4.00	0.00	0.00	10.00	Show Timeline
Anne Clinton	2013-01-01 - 2013-12-31	2.00	0.00	0.00	2.00	0.00	Show Timeline
Roiston Lake	2013-01-01 - 2013-12-31	0.00	0.00	0.00	0.00	0.00	Show Timeline

Figure 7.6 Employee Leave Report

If the "Employee" option is selected under "Generate For" (Figure 7.4) the HR Admin can generate the leave entitlement and usage report for any employee. The name of the employee will need to be inserted into the "Employee" field, and a report will be generated for that employee (as shown in Figure 7.7).

Leave Entitlements and Usage Report

Generate For *
[Employee ▼]

Employee *
[Ryan Parker]

* Required field

[View] [Export To CSV]

Leave Type	Current Leave Period	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)	
United States - Annual	2013-01-01 - 2013-12-31	11.00	2.00	0.00	3.00	6.00	Show Timeline
United States - Sick leave (Deleted)	2013-01-01 - 2013-12-31	7.00	0.00	0.00	0.00	7.00	Show Timeline
United States - Casual leave	2013-01-01 - 2013-12-31	7.00	0.00	0.00	1.00	6.00	Show Timeline

Figure 7.7: Leave Entitlements and Usage Report of a single employee

The Admin user can see view the Leave Entitlements and Usage Report of all employees, as well as himself/herself if he/she is also an employee. ESS –Supervisor users can view the Leave Entitlements and Usage Reports of only his/her subordinates, as well as for themselves (**Leave>>Reports>> My Leave Entitlements and Usage Report).**

If an employee is an Admin user or ESS Supervisor or then he/she will see an extra menu item under **Leave>>Reports** called **My Leave Entitlements and Usage Report** (Figure 7.8)**.**
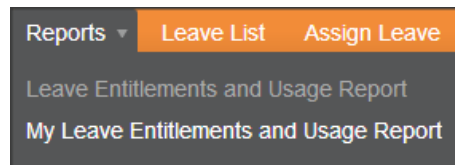
Figure 7.8: Admin Employee and ESS Supervisor menu view

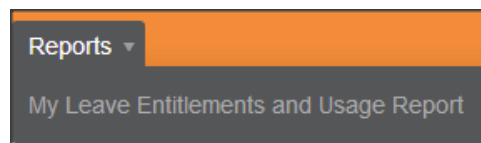If the user is an ESS User, then he will only see the "**My Leave Entitlements and Usage Report**" option under **Leave>>Reports**, as shown in Figure 7.9.

Figure 7.9: ESS User menu view

When clicked on, the following screen will appear as shown in Figure 7.10.

My Leave Entitlements and Usage Report

Leave Type	Current Leave Period	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)	
United States - Annual	2013-01-01 - 2013-12-31	11.00	2.00	0.00	3.00	6.00	Show Timeline
United States - Sick leave (Deleted)	2013-01-01 - 2013-12-31	7.00	0.00	0.00	0.00	7.00	Show Timeline
United States - Casual leave	2013-01-01 - 2013-12-31	7.00	0.00	0.00	1.00	6.00	Show Timeline
United States - Maternity Leave	2013-01-01 - 2013-12-31	0.00	0.00	0.00	0.00	0.00	Show Timeline
United States - Paternity	2013-01-01 - 2013-12-31	0.00	0.00	0.00	0.00	0.00	Show Timeline

Figure 7.10: My Leave Entitlements and Usage Report

7.0 Leave List

The leave list is available to the Admin and ESS – Supervisors. It shows the entire leave request by the employees.

- **Global Admin:** can see and manage leave application and for all employees based in all the locations/regions of the organization.
- **Regional Admin:** can see and manage leave application for all employees based in all the **assigned** locations/regions of the organization.
- **ESS-Supervisor**: can see and manage leave application of his/her subordinates.
- **ESS-Employee**: has no access to this feature.

7.1   View/Action Leave Request

When an employee applies for a leave his Supervisor (and Admin as well, if configured under Notifications) will receive a mail with a link to the leave list and upon clicking on that link either the Supervisor or the Admin can approve, reject or cancel the leave.

Alternatively, an HR Admin or an ESS-Supervisor may also log into the system and action the following leave requests.

To view "Leave List", go to **Leave>>Leave List** and the screen as shown in Figure 8.0 will appear. You may also action the following leave request by selecting an action from the "Action" drop down menu.

Figure 8.0: Admin/ESS Supervisor Leave List

Click "Save" once an action has been selected. The following leave request in which an action has been applied will no longer appear in the leave list as shown in Figure 8.1. A mail will be then sent to the employee and he can view the status of his leave application.

Figure 8.1: Leave Status Notified to Employee.

Alternatively, you may action the following leave request by selecting an action from the drop down menu of "Actions" or you may click the "Date" / "Status" to view the a detailed information of the leave request and action them individually as shown in Figure 8.2. Select necessary actions to the leave request and click "Save".

Figure 8.2: Leave Request in Detail
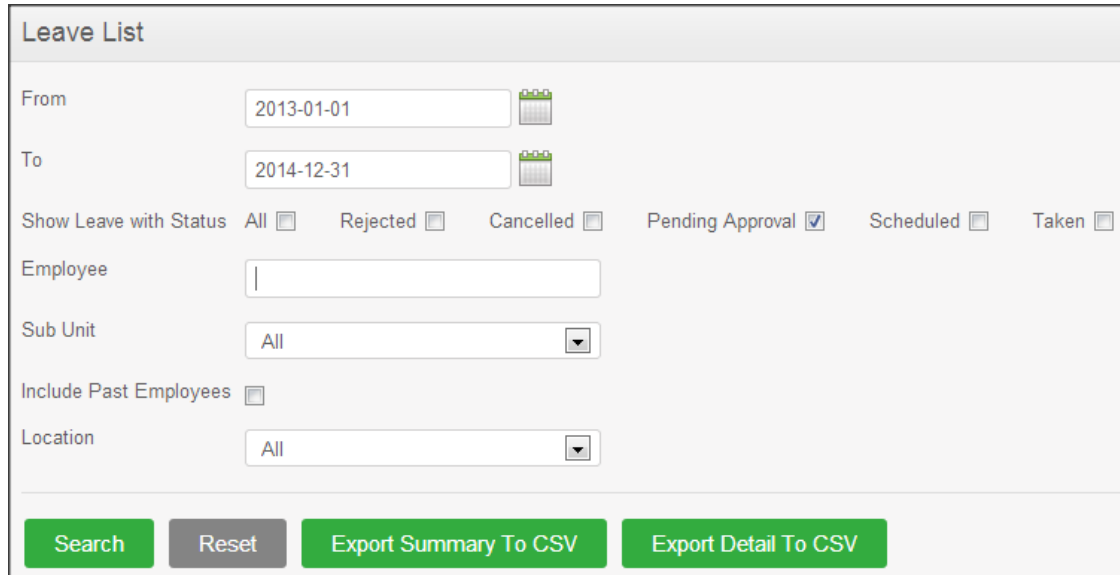
Once the necessary actions have been made to the leave requests, they will no longer appear in the leave list. A mail will be then sent to the employee and he can view the status of his leave application.

7.2   Search Leave List

You can view leave using the search toolbar as shown in Figure 8.3 by:

- Specifying the period using the "From" and "To" dates
- Selecting the status or combination of status of the following:
    - Rejected
    - Canceled
    - Pending Approval
    - Approved
    - Taken

- Search for the employee
- Search by Sub-Unit
- You may also include past employees with your search.
- Location (specified under Admin>>Organization>>Locations).

Figure 8.3: Leave List Search

7.3 Export to CSV
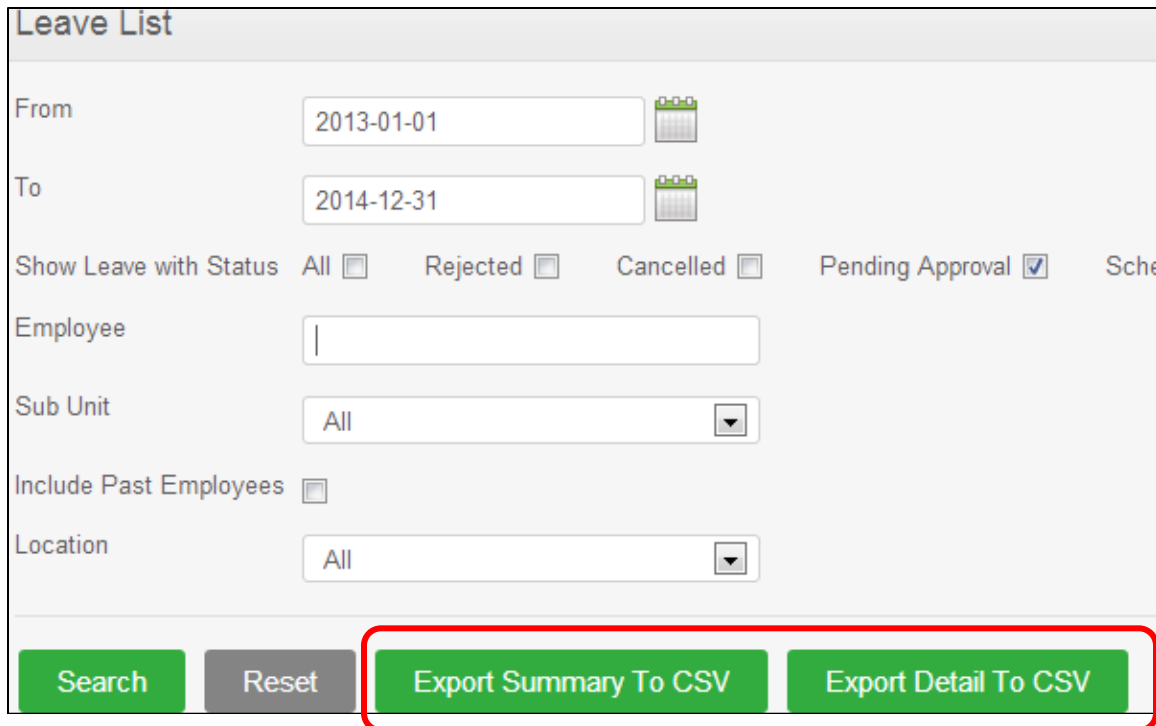
The admin/ESS Supervisor is also able to export the leave list to a CSV file by clicking on either the "Export Summary to CSV" button or "Export Detail to CSV".

By clicking on "**Export Summary to CSV**", the following information will be captured in a CSV file:
- Date
- Employee Name (Full Name)
- Leave Type
- Number of Days
- Status
- Comments

By clicking on "**Export Detail to CSV**", the following information will be captured in a CSV file:
- Date
- Employee Name
- Leave Type
- Status
- Duration(hours)
- Comments

Figure 8.4: Export to CSV

7.4 Assign Leave

This feature is only available to an HR Admin (Global and Regional) and ESS-Supervisor. To assign leave, go to **Leave>> Assign Leave** and the screen as shown in Figure 8.5 will appear.

- **Global Admin:** can assign leave for all employees based in all the locations/regions of the organization.
- **Regional Admin:** can see assign leave for all employees based in all the **assigned** locations/regions of the organization.
- **ESS-Supervisor**: can see assign leave for his/her subordinates.
- **ESS-Employee**: has no access to this feature.

Figure 8.5: Assign Leave

Select the name of the employee, you can do this by entering the first letter of his name and you will see list of employees with that letter and you can select the relevant employee, then select the leave type, the dates in which the leave is to be taken and you can add a comment if necessary. The system also shows the remaining leave balance for the specific leave type.

Click "Assign" when you are done and the employee and the admin will be notified via e-mail. The leave balance will also be deducted.

When the employee logs in to the system and checks his/her leave by going to **Leave>> My Leave**, he/she will see the leave that was assigned to him/her as shown in Figure 8.6.

Figure 8.6: ESS-Employee "My Leave" View

7.5   My Leave

This feature item is available for ESS-Employee and ESS Supervisors. This is also available to employees in the system that have been assigned Global Admin and Regional Admin user role.

Personal leave details can be viewed here. To view, go to **Leave>> My Leave** and the screen as shown in Figure 8.7 will appear.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	14.00	3.00	Pending Approval(3.00)	💬	Select Action ▾
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	14.00	3.00	Taken(3.00)	💬	
Save							

Figure 8.7: My Leave View

An employee can choose to cancel a pending approval leave or a scheduled leave however he cannot make any changes to any other leave status.

He/she can view complete details of leaves by clicking on the "Date" or "Status". To cancel a leave request click on the "Actions" drop down, select "Cancel" and click "Save".

If the email notifications functionality has been configured (see section 5.6 for more information), email notifications on leave application, cancellations, rejections and approvals will be sent to the employee who has applied for leave, as well as to the Admin Users who have subscribed for the leave management mail notifications.

7.6   Apply

All users except for the Admin unless he is an employee can apply leave from this option. To apply for a leave go to **Leave>>Apply** and the screen shown as shown in Figure 8.8 will appear.

Figure 8.8: Apply Leave

Select the leave type from the drop down menu and the "From Date" and "To Date" you require the leave, once you select the dates you will see the "From Time", "To Time" and "Total Hours". You can enter the times and the "Total Hours" would automatically populate. The "Leave Balance" would also appear indicating how may leave balance you have for the particular leave type. You may also add a comment on why you need the leave.

Once you have filled in the details click "Apply" and a mail will be sent to the Supervisor (as well as the Admin, if configured under Notifications) for approval. The status of your leave application can be seen in "My Leave" as shown in Figure 8.9.

| Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
2013-04-26	Kevin Ryan	Annual Leave	13.67	0.33	Pending Approval(0.33)	Half day leave.	Select Action
2013-04-17 to 2013-04-19	Kevin Ryan	Annual Leave	13.67	3.00	Pending Approval(2.00), Scheduled(1.00)		Go to Detailed View
2013-04-03 to 2013-04-05	Kevin Ryan	Annual Leave	13.67	3.00	Taken(3.00)		

Save

Figure 8.9: My Leave View

7.7 Leave Calendar

The administrators, ESS-Employee and ESS-Supervisor can have access to the leave calendar. To view the leave calendar go to **Leave>> Leave Calendar** and the screen as shown in Figure 9.0 will appear.

- **Global Admin:** can view the monthly leave calendar of all employees based in all the locations/regions of the organization.
- **Regional Admin:** can view the monthly leave calendar of all employees based in all the **assigned** locations/regions of the organization.
- **ESS-Supervisor**: can view his personal monthly leave calendar and of his/her subordinates.
- **ESS-Employee**: can view his personal monthly leave calendar.

*Note: Leave calendars can be generated based on Monthly or Yearly views. The default view is set to Monthly.
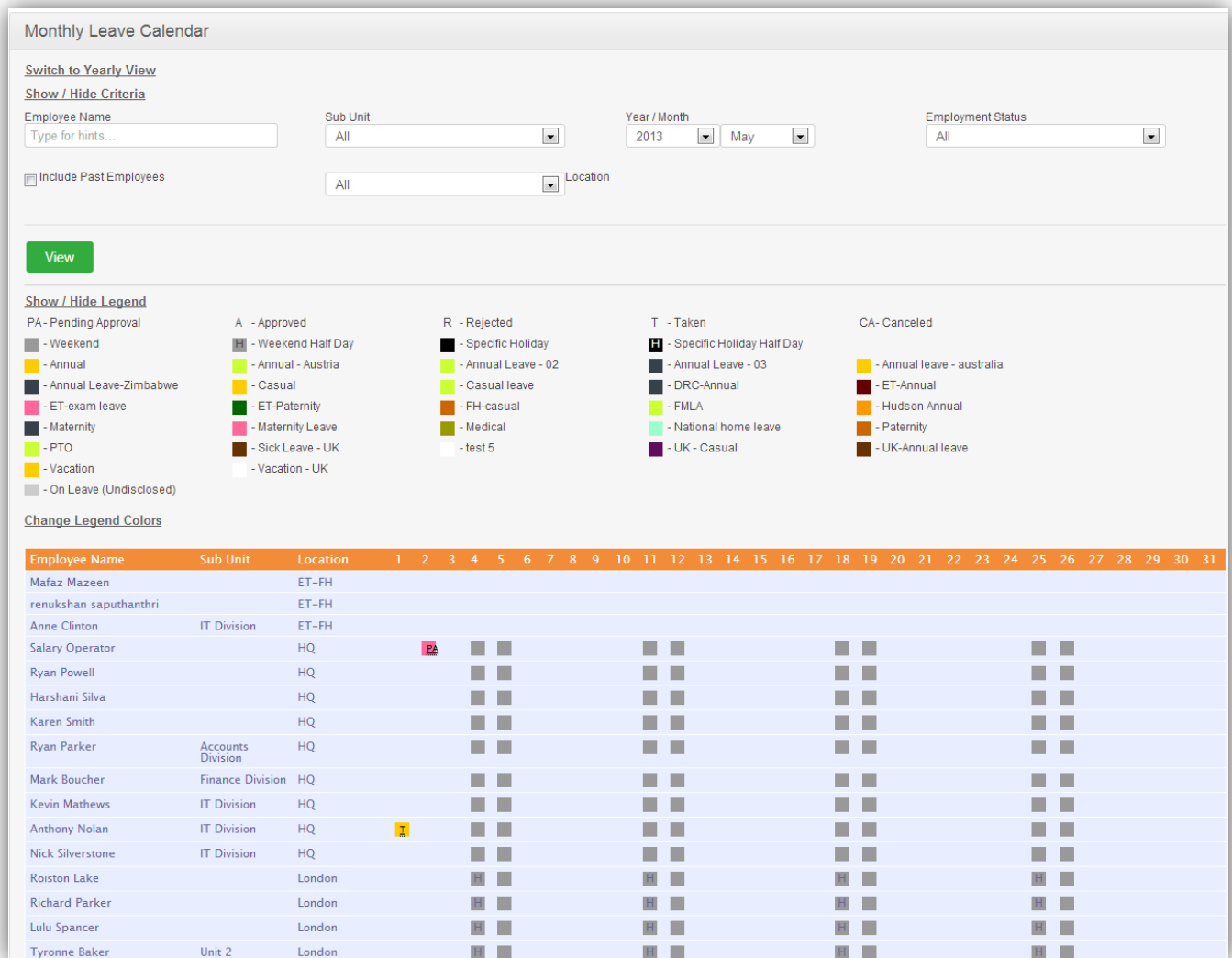
Figure 9.0: Leave Calendar (Monthly view)

Legend colors have been used to signify different leave types and their statuses.

An administrator whether global admin or regional admin can change the legend colors of leave types by clicking "**Change Legend Colors**" and the screen as shown in Figure 9.1 will appear.
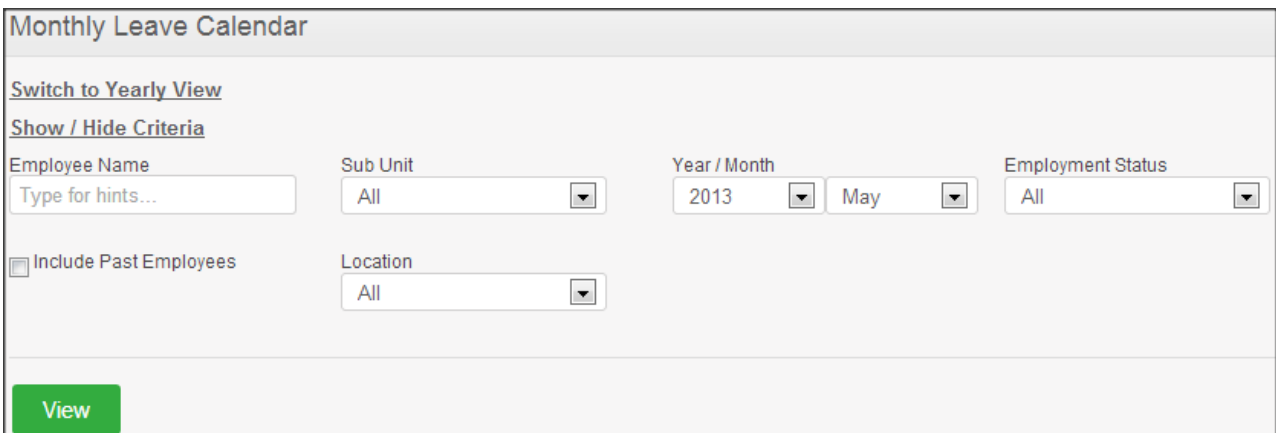
Once the changes have been made, click "**Save**".
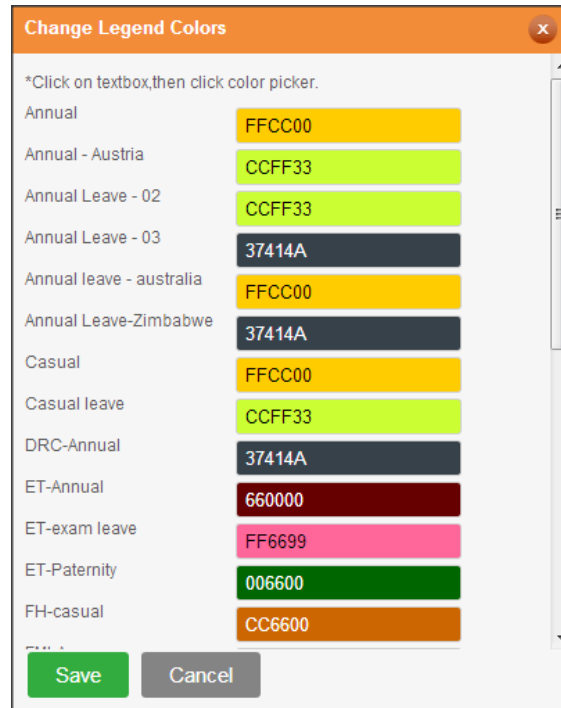
Figure 9.1: Change Legends Colors

7.7.1 Leave Calendar for Admins

Figure 9.2 below shows the search criteria which could be used by administrators to view a monthly leave calendar.

Figure 9.2: Leave Calendar search criteria (Monthly)

- **Employee Name**: The administrator and the supervisor can view the leave calendar of a particular employee by typing the employee's name.
- **Sub-Unit**: An administrator and supervisor can view the leave details of employees within a sub-unit.
- **Year/Month**: to view leave details of an employee within a particular time period.
- **Employment Status**: Administrators and supervisors can view leave details of employees with a particular employment status.
- **Include Past Employee**: Administrator and supervisor can view leave details of past employees as well.
- **Location:** Administrators and supervisors can view leave details of employees who are based in specific locations.

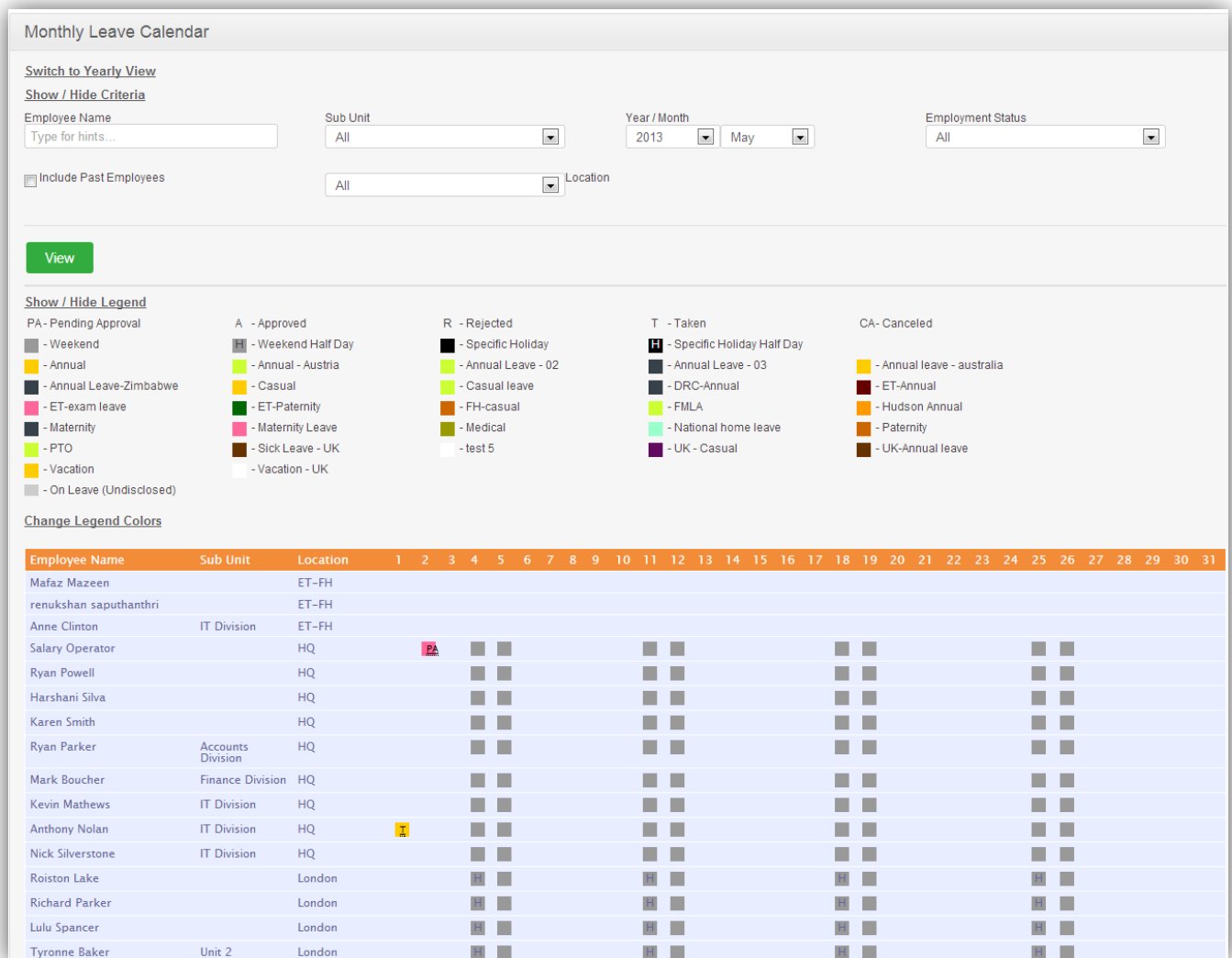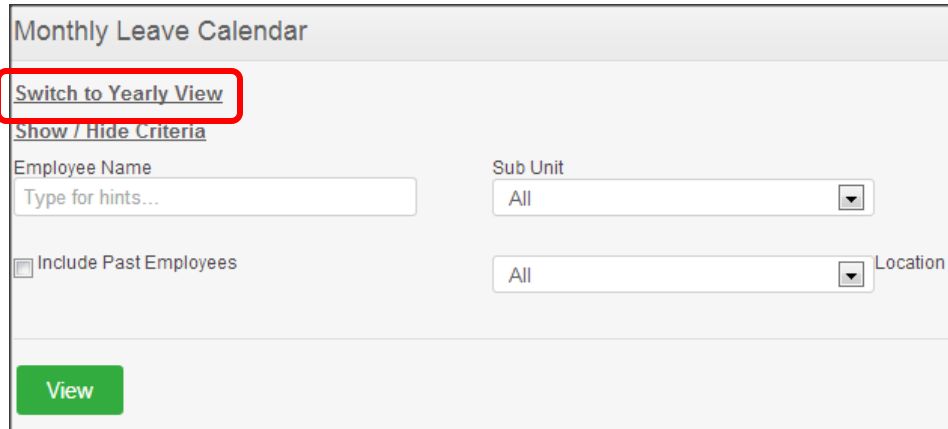Once the options are selected, click "View" (Figure 9.3).

Figure 9.3: Leave Calendar

To view the Yearly calendar view, the user must click "Switch to Yearly View" (Figure 9.4).

Figure 9.4: Change to Yearly view

The employees name can then be typed in, and a year selected. Once the user clicks "View", he will be shown with the yearly calendar view for that employee (Figure 9.5).
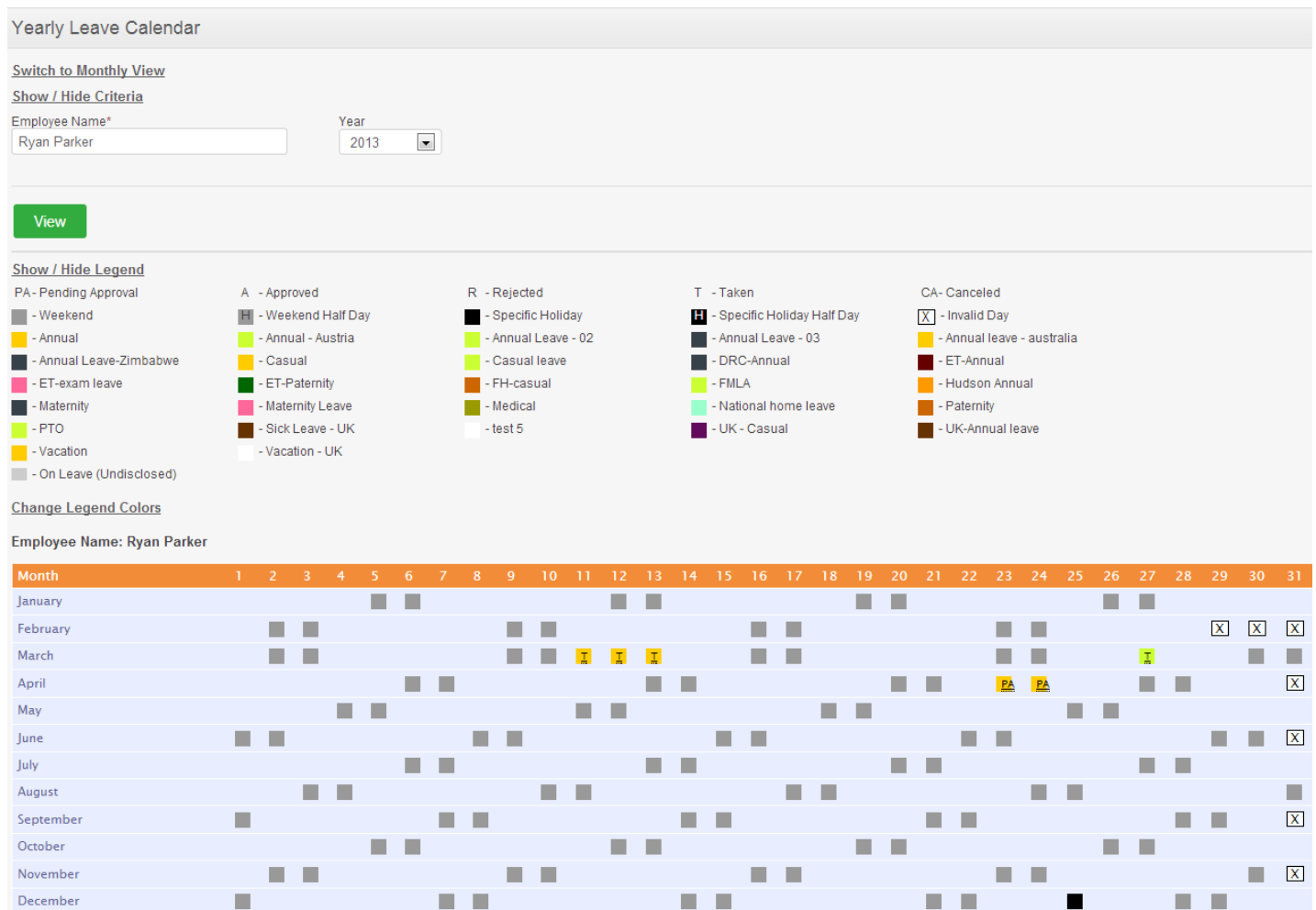

Figure 9.5: Yearly calendar view

7.7.2 Leave Calendar for Supervisors

Supervisors can view leave details of their subordinates as well as their personal leave details in the leave calendar.

A supervisor can run search criteria to view their subordinate's leave details or their personal leave details.

Figure 9.6 shows the leave calendar for a particular month. Highlighted in pink are the personal leave details of the supervisor first in the list. The list also shows the subordinates' leave details in the same leave calendar.
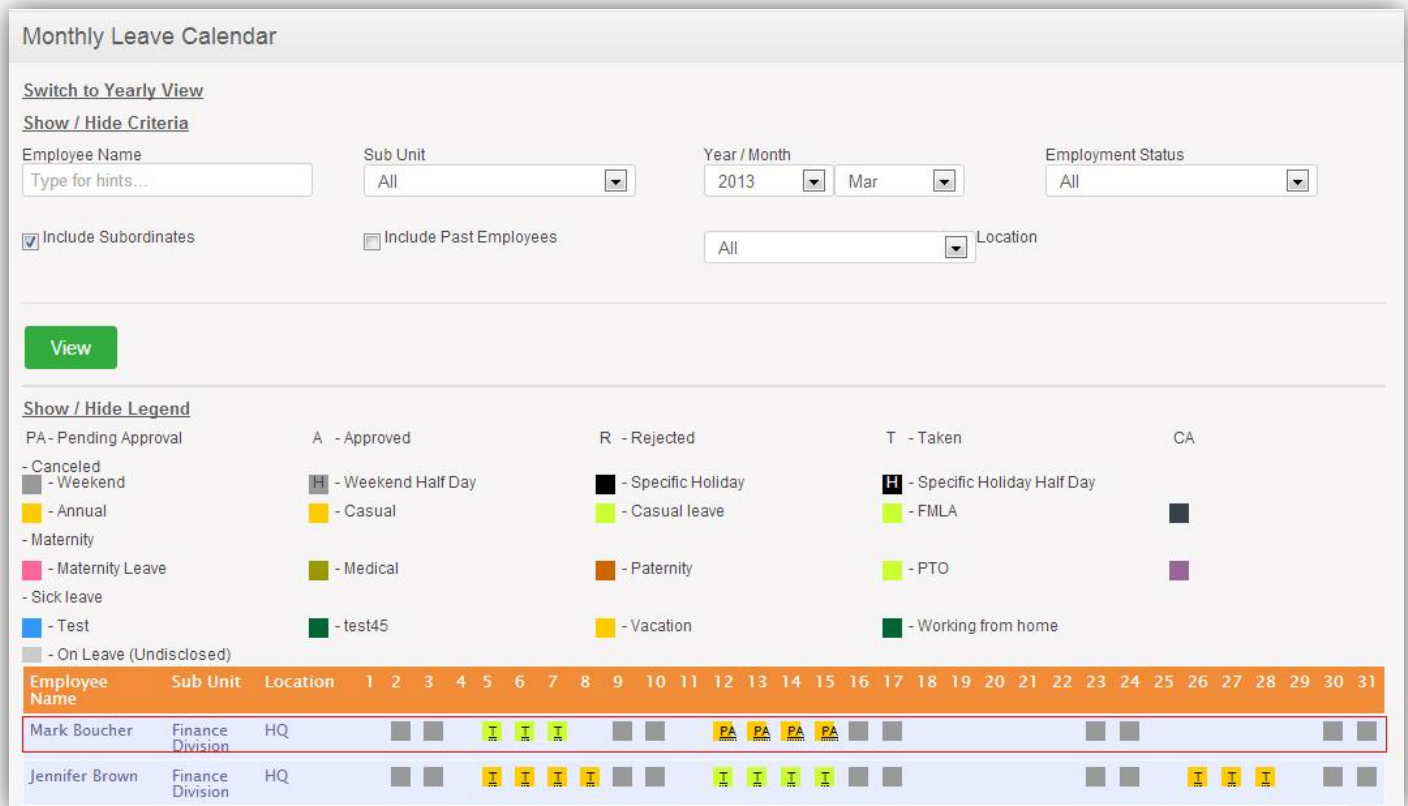
Figure 9.53: ESS Supervisor Leave Calendar (monthly view)

For further details, please contact sales@orangehrm.com